

LGIS Group Customer Privacy Notice



**LGIS Group and Affiliates (herein called “we,” “our,” and “us”)
This Privacy Notice Applies to Our Operations**

Commitment to Your Privacy

LGIS Group values your trust and is committed to the responsible management, use, and protection of your Personal Information. This Customer Privacy Notice explains how we collect, use, disclose, and safeguard Personal Information in connection with our products and services. We collect Personal Information to service your transactions with us and support our business operations.

Information We Collect

We may obtain Personal Information from you directly, your transactions with us, and third parties such as consumer reporting agencies. Depending on the product or service, we may collect information such as your name, your address, your phone number, your email address, your deal information, and your payment details for your application fee, and other relevant files to conduct a preliminary quote and/or the underwriting process. This information may come from applications, transactions, and uploaded files.

How We Use Your Information

We use Personal Information to provide and manage our products & services, process applications, claims, and transactions, operate and improve our business functions, and comply with legal and regulatory obligations.

Sharing of Personal Information

To serve you and operate our business, we may share Personal Information only as permitted by law. We may share Personal Information with our affiliates, including: LGIS Group insurance or service companies, authorized agents and representatives, brokerage partners, administrators.

- **Marketing and Business Use:** As allowed by law, we may share Personal Financial Information with our affiliates to market our products or market our services to you, providing an option to opt out, where permitted by law.

Sharing with Third Parties

We may also share Personal Information, as allowed by law, with unaffiliated third parties including independent agents, brokerage firms, insurance providers, administrators, and service providers. These parties help us operate and support our business. We may also share information with third parties who assist in conducting surveys, marketing our services, and offering financial or insurance products under joint arrangements.

Cookies and Tracking Technologies

We and our partners may use technologies such as cookies, pixel tags, and similar tracking tools. These help us improve website functionality and user experience.

Online Privacy

For more information about online data collection, please refer to our Privacy Policy for the governing data collected through our websites and digital platforms.

Sale and Sharing of Information

We do not sell or share Personal Financial Information for unrelated purposes unless required or permitted by law. Where required, we will provide you with the ability to opt out or opt in.

Employee Access to Information

Our employees may access Personal Information only as needed to perform job responsibilities such as underwriting policies, processing claims, developing services, and servicing customer accounts.

Data Security

We use administrative, technical, and physical safeguards to protect Personal Information, including secure storage systems, user authentication, encryption and SSL website certificates for security, firewall protection, and monitoring & detection tools.

Responsibility and Access Control

We are responsible for identifying Personal Information that must be protected, ensuring proper levels of protection, and restricting access to authorized personnel only. Employees who violate privacy policies may face disciplinary action, including termination.

Data Retention

We continue to protect Personal Information even after the business relationship ends, in accordance with applicable laws and policies.

Definitions

Application

Your request for a product or service from LGIS Group.

Personal Financial Information

Includes financial data such as deal information, policy or claim information, and other relevant financial information to issue a policy or process a claim.

Personal Information

Information that identifies you, including Personal Financial Information.

Transaction

Your dealings with LGIS Group, including applications, claims, and account service requests.

You

An individual who provides Personal Information when requesting information, applying for services, and obtaining a financial or insurance product.

Contact Us

If you have questions or concerns about this Privacy Notice, you may contact:

LGIS Group – Privacy Compliance Team

David Eichenblatt

Atlanta, Georgia 30326

deichenblatt@lgisgroup.com

(404) 229-5888