



JAEGER & FLYNN ASSOCIATES, INC. PRIVACY NOTICE

Jaeger & Flynn Associates, Inc. knows that your privacy is important. You have received this notice as required by law and because you are now or may be a customer or an employee benefit plan participant or beneficiary. This notice will advise you of the types of Nonpublic Personal Information we collect, how we use it, and what we do to protect your privacy.

“Nonpublic Personal Information” refers to personally identifiable information that is not available to the public.

“Employees” refers to individuals who act on our behalf.

- ❖ Our Employees collect Nonpublic Personal Information about you, including information:
 - given to us on applications or other forms;
 - about transactions with us.
- ❖ The types of Nonpublic Personal Information we collect depends on policies, benefit plans or services we offer or provide to you and may include your: name; address; Social Security Number; account balances; coverage and marital status. We may also collect Nonpublic Personal Health Information, such as medical information, to process claims or for other related functions.
- ❖ We restrict access to Nonpublic Personal Information to those Employees who provide products OR services to you and who have been trained to handle Nonpublic Personal Information as described in this Notice.
- ❖ We have policies and procedures that direct our Employees acting for us on how to protect and use Nonpublic Personal Information.
- ❖ We have physical, electronic, and procedural safeguards in place that were designed to protect Nonpublic Personal Information.
- ❖ We do not share Nonpublic Personal Information about you except as allowed by law.
- ❖ We may disclose all types of Nonpublic Personal Information that we collect, including information regarding your transactions or experiences with us, when needed, to: (i) our Employees as permitted by law; or (ii) other entities with which we have joint agreements as permitted by law.
- ❖ We do not share your Nonpublic Personal Health Information unless authorized by you or allowed by law.
- ❖ You will be notified if our privacy policy changes.
- ❖ Our privacy policy applies to current and former plan participants and customers.

This Privacy Notice is provided for your information only. You do not need to call or take any action.

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