



The following language below should be added to your Agency's website in order to comply with privacy laws surrounding the collection of data. If you have any questions or are unsure how to implement this language, please reach out to the LHabermehl@FoundationRP.com. (Last updated June 2022)

Privacy Policy

AGENCY NAME, a DBA of Foundation Risk Partners, Corp., cares about our users' privacy. Please read our privacy policy carefully. If you have questions, please contact us at your **agency's contact email**.

How We Handle Your Personal Information

We do not sell information about our current or former clients or their accounts to third parties. We also do not sell information gathered from contact and registration forms on our websites. We do not share information except when needed to complete transactions at your request or to make you aware of related financial products, services and information we offer.

Change or Delete Information

To change, delete or otherwise update your personal information, please contact us at Privacy@FoundationRP.com. Please note it can take up to seven days for changes to become effective.

Changes to Policy

Foundation Risk Partners reserves the right to change, modify or amend its privacy policy at any time. Any changes will be incorporated into this posted privacy policy and effective immediately with no further obligation of notification to users. Please review this policy periodically to ensure you are aware of our most current practices.

PRIVACY NOTICE FOR CALIFORNIA RESIDENTS

This notice supplements the information contained in the privacy policy of Foundation Risk Partners and its affiliates (collectively, "we", "us", or "our") and applies solely to visitors, users, and others who reside in the State of California ("consumers" or "you"). We adopt this notice to comply with the California Consumer Privacy Act of 2018 ("CCPA") and other California privacy laws. Any terms defined in the CCPA have the same meaning when used in this notice.

Information We Collect

We collect information that identifies, relates to, describes, references, is capable of being associated with, or could reasonably be linked, directly or indirectly, with a particular consumer or device ("personal information"). In particular, we may have collected the following categories of personal information from consumers within the last twelve (12) months:



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- Identifiers, such as name, address and Social Security number;
- Personal information, as defined in the California safeguards law, such as contact information and financial information;
- Characteristics of protected classifications under California or federal law, such as sex and marital status;
- Commercial information, such as transaction and account information;
- Biometric information, such as fingerprints;
- Internet or network activity information, such as browsing history and interactions with our website;
- Geolocation data, such as device location;
- Audio, electronic, visual, or similar information, such as call and video recordings;
- Professional or employment-related information, such as work history and prior employer;
- Education information, such as school and date of graduation; and
- Inferences drawn from any of the Personal Information listed above to create a profile about, for example, an individual's preferences and characteristics.

We obtain the categories of personal information listed above from the following categories of sources:

- Directly from our clients or their agents. For example, from documents that our clients provide to us related to the services for which they engage us.
- Indirectly from our clients or their agents. For example, through information we collect from our clients in the course of providing services to them.
- Directly and indirectly from activity on our website. For example, from submissions through our website portal or website usage details collected automatically.
- From third parties that interact with us in connection with the services we perform.

Use of Personal Information

We may use or disclose the personal information we collect for one or more of the following business purposes:

- To fulfill or meet the reason for which the information is provided. For example, to submit this information to our clients or their agents in the form of insurance application forms or request for information.
- To provide you with information, products or services that you request from us.
- To provide you with email alerts and other notices concerning our Services, or updates to your insurance application process.
- To carry out our obligations and enforce our rights arising from any contracts entered into between you and us, including for billing and collections.
- To improve our services to you.
- For testing, research, analysis and product development.
- As necessary or appropriate to protect the rights, property or safety of us, our clients or others.
- To respond to law enforcement requests and as required by applicable law, court order, or governmental regulations.
- As described to you when collecting your personal information or as otherwise set forth in the CCPA.



- To evaluate or conduct a merger, divestiture, restructuring, reorganization, dissolution, or other sale or transfer of some or all of our assets, whether as a going concern or as part of bankruptcy, liquidation, or similar proceeding, in which personal information held by us is among the assets transferred.

We will not collect additional categories of personal information or use the personal information we collected for materially different, unrelated, or incompatible purposes without providing you notice.

Sharing Personal Information

We may disclose your personal information to a third party for a business purpose. When we disclose personal information for a business purpose, we enter a contract that describes the purpose and requires the recipient to both keep that personal information confidential and not use it for any purpose except performing the contract.

In the past 12 months, we may have disclosed the following categories of Personal Information relating to California residents to third parties for our business purposes:

- Identifiers, such as name and Social Security number;
- Personal information, as defined in the California safeguards law, such as contact information and financial information;
- Characteristics of protected classifications under California or federal law, such as sex and marital status;
- Commercial information, such as transaction and account information;
- Biometric information, such as fingerprints;
- Internet or network activity information, such as browsing history and interactions with our website;
- Geolocation data, such as device location;
- Audio, electronic, visual, or similar information, such as call and video recordings;
- Professional or employment-related information, such as work history and prior employer;
- Education information, such as school and date of graduation; and
- Inferences drawn from any of the Personal Information listed above to create a profile about, for example, an individual's preferences and characteristics.

Your Rights and Choices

The CCPA provides consumers (California residents) with specific rights regarding their personal information. This section describes your CCPA rights and explains how to exercise those rights.

When required, we will respond to most requests within 45 days, unless it is reasonably necessary for us to extend our response time.

Right to Disclosure of Information



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You have the right to request that we disclose certain information regarding our practices with respect to personal information. If you submit a valid and verifiable request and we confirm your identity and/or authority to make the request, we will disclose to you any of the following at your direction:

- The categories of personal information we have collected about you in the last 12 months.
- The categories of sources for the personal information we have collected about you in the last 12 months.
- Our business or commercial purpose for collecting that personal information.
- The categories of third parties with whom we share that personal information.
- The specific pieces of personal information we collected about you.
- If we sold your personal information for a business purpose, a list of the personal information types that each category of recipient purchased.
- If we disclosed your personal information to a third party for a business purpose, a list of the personal information types that each category of recipient received.

Right to Delete Personal Information

You have the right to request that we delete any of your personal information that we collected from you and retained, subject to certain exceptions. If you submit a valid and verifiable request and we can confirm your identity and/or authority to make the request, we will determine if retaining the information is necessary for us or our service providers to:

- Complete a transaction for which we collected the personal information, provide a good or service that you requested, take actions reasonably anticipated within the context of our ongoing business relationship with you, or otherwise perform our contract with you
- Detect security incidents, protect against malicious, deceptive, fraudulent, or illegal activity, or prosecute those responsible for such activities;
- Debug products to identify and repair errors that impair existing intended functionality.
- Exercise free speech, ensure the right of another consumer to exercise their free speech rights, or exercise another right provided for by law;
- Comply with the California Electronic Communications Privacy Act (Cal. Penal Code § 1546 seq.);
- Engage in public or peer-reviewed scientific, historical, or statistical research in the public interest that adheres to all other applicable ethics and privacy laws, when the information's deletion may likely render impossible or seriously impair the research's achievement, if you previously provided informed consent;
- Enable solely internal uses that are reasonably aligned with consumer expectations based on your relationship with us;
- Comply with a legal obligation; and/or
- Make other internal and lawful uses of that information that are compatible with the context in which you provided it.

If none of the above retention conditions apply, we will delete your personal information from our records and direct our service providers to do the same.

How to Exercise Your Rights



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To exercise the access, data portability, and deletion rights described above, please submit a verifiable consumer request to us by either:

- Calling us at 386-888-7301 or
- Emailing Privacy@FoundationRP.com

You may only make a verifiable consumer request for access or data portability twice within a 12-month period. The verifiable consumer request must:

- Provide sufficient information that allows us to reasonably verify you are the person about whom we collected personal information or an authorized representative.
- Describe your request with sufficient detail that allows us to properly understand, evaluate, and respond to it.

You will not be required to create an account with us in order to submit a verifiable request, though we may communicate with you about your request via a pre-established account if applicable. However, in order to safeguard the personal information in our possession, if we cannot verify your identity or authority to act on another's behalf, we will be unable to comply with your request. We will only use personal information you provide when submitting a verifiable request to confirm your identity or authority, or to fulfill your request.

Right to Non-Discrimination

You may exercise your rights under the CCPA without discrimination. For example, unless the CCPA provides an exception, we will not:

- Deny you goods or services;
- Charge you different prices or rates for goods or services, including through granting discounts or other benefits, or imposing penalties;
- Provide you a different level or quality of goods or services; or
- Suggest that you may receive a different price or rate for goods or services or a different level or quality of goods or services

Changes to this Privacy Notice

We reserve the right to amend this Privacy Notice at our discretion and at any time. The date this Privacy Notice was last updated is identified at the bottom of this page. You are responsible for periodically visiting the Foundation Risk Partners website and this Privacy Notice to check for any changes.

Contact Information

If you have any questions or comments about this Privacy Notice, our Privacy Policy, the ways in which we collect and use your personal information, your choices and rights regarding such use, or wish to exercise your rights under California law, you may contact us via email at Privacy@FoundationRP.com.

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