

Client Personal Information Protection Policy

As a nationally-recognized, licensed insurance agency and third-party administrator, The Lewer Agency, Inc. understands the importance of maintaining the privacy of our clients' personal information. Client privacy is of the utmost important to us and maintaining the trust and confidence of our clients is a top priority.

In order to protect your personal information, The Lewer Agency has adopted the following rigorous Client Personal Information Protection Policy for the protection of our clients and in compliance with various state and federal privacy laws.¹

In the normal course of providing insurance services, we collect certain nonpublic personal information about our clients that is provided to us by our clients or obtained by us with their authorization or consent. However, **we do not disclose any personal information about our clients or former clients to anyone, except as necessary to effectuate the purpose of our business relationship or as required by law.**

Specifically, The Lewer Agency routinely undertakes the following protections:

- We retain records relating to the services that we provide so that we are better able to assist our clients with their needs and to comply with professional guidelines or requirements of law.
- We maintain physical, electronic, and procedural safeguards that comply with federal and state laws to guard our clients' nonpublic personal information.
- We protect the confidentiality of clients' Social Security numbers, prohibit unlawful disclosure of our clients' Social Security numbers, and limit access to our clients' social security numbers in the same manner as we do all other nonpublic personal information.
- We do not utilize social security numbers for identification numbers or claims-processing purposes. Documents and information containing social security numbers and other non-public personal information are safeguarded and not disclosed to anyone, unless authorized by the client or required by law.
- We restrict access and use of social security number and non-public personal information only to those employees and underwriters who are involved in offering and administering the products and services we offer.
- We train our employees in the importance of maintaining confidentiality and customer privacy.
- We destroy, erase or make unreadable documentation containing social security numbers and/or other nonpublic personal information prior to its disposal.
- We continuously monitor and make adjustments to this Client Personal Information Protection Policy as necessary.

¹ Including but not limited to Public Act 08-167 of the Connecticut General Statutes, "An Act Concerning the Confidentiality of Social Security Numbers."