

SHERZER & ASSOCIATES INSURANCE AGENCY, INC.

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IMPORTANT PRIVACY NOTICE REGARDING YOUR NONPUBLIC PERSONAL INFORMATION

At Sherzer & Associates Insurance Agency, Inc., we know the importance of respecting your privacy and maintaining your trust. When we collect personal information, we keep it private. We have physical, electronic, and procedural security measures in place that comply with legal standards to protect your personal information. The only employees who have access to your information are those who must have it to serve you.

(1) Information We Collect

In order for us to obtain or service the insurance products that you ask for from us, we may collect personal information from you, as well as from others.

Personal Information includes any identifying information, such as:

- Your name, address, e-mail address, phone number;
- Age, marital status, occupation, social security number, assets, income, and beneficiaries;
- Claim history, driving record, car make and model, license number, lender and lease agent;
- Credit history, credit standing, policy coverage, premiums, and payment history.

We collect your personal information from:

- You in person, by telephone, or over the Internet;
- Forms you submit to us, such as applications, claims, and policy updates
- Your business dealings with us and with other companies;
- Consumer reporting agencies;
- The DMV to verify driving record, auto title, or license status;
- Claims databases, such as the Comprehensive Loss Underwriting Exchange.

(2) How We Use and Disclose Personal Information

In order for us to obtain, or to service, the insurance products that you ask for from us, we may disclose your personal information to affiliated and nonaffiliated companies. However, we do not sell personal information or customer lists to anyone for marketing. We only disclose information about you as allowed or required by law. In those instances, we may disclose personal information without your prior consent.

We may disclose personal information to:

- Financial companies, such as life, automobile, and property insurers.
- Service providers that help process or service your account; Medical-care facilities or providers, to verify coverage and benefits;

- A court, governmental or regulatory agency when there is a lawful request;
- Law enforcement to protect against fraud or unauthorized transactions;
- A group policyholder for purposes of reporting claims experience

When we use service providers to help us service your account, your personal information stays confidential. Our service providers agree to keep personal information private and not use it for any other purpose.

We only use medical data to process claims. We do not share medical information without your prior consent.

We share personal information with insurance data banks that collect information about claim history, accident fault, and amounts paid. Insurance data banks may retain personal information and disclose it to other insurance companies and others legally entitled to see it.

We send current customers a privacy notice each year. If our practices change, we will inform you promptly. We treat our former customer's information the same as our current customer's information.

(3) Right to Access and Correct Personal Information

You have the right to access, and to request the correction, the amendment, or the deletion of all of your recorded personal information that has been collected by us. If you wish to review your recorded personal information, please write to us at:

Sherzer & Associates Insurance Agency, Inc
c/o Darwin Meiners
110 Stony Pt Rd, Suite 120
Santa Rosa, Ca 95401

Include your name, address, telephone number, and policy number and let us know what kind of information you want to see. You may see and copy your information in person, or, if you prefer, we will copy and send you your information. We may charge a small fee to collect and send the information to you.

If you see any mistakes, let us know and we will review it. If we agree, we will correct our files. If we disagree, you may file a short statement of dispute with us. Your statement will be included with any data we disclose in the future. We will also send the statement to anyone you ask us to who received your information from us in the past two years.

(4) **For More Information or If You have Questions**

Please call us collect at (707) 573-1010 and ask for Darwin Meiners if you have any questions about this form, or about any of our policies.

We look forward to serving you in all of your insurance needs.