**DATE** – March 24, 2020

In the past 12 months, we have collected and shared the following categories of personal information from consumers.

| **Categories of PI Collected** | **Examples/Description** | **Categories of Sources of PI Collected** | **Business or Commercial Purpose of the Collection** | **Categories of Third Parties to Whom PI is Shared** |
| --- | --- | --- | --- | --- |
| Contact Information | * Name * Residential Mailing address * Email address * telephone number | * You (*e.g.,* if you establish an account on our platform, request a demo on our website, or request Services directly from us) * Third parties acting on your behalf (e.g., a financial advisor) * Vendors who assist us in our Services, such as medical record retrieval services | * Inception/rendering of Services for you * Communicate with you * Compliance/security monitoring | * Vendors we engage in order to perform operations and our Services * Insurance carriers whose products you seek to purchase |
| Government Identifiers | * Social security numbers * Driver’s license or state identification card numbers * Benefits recipient numbers | * You (*e.g.,* if you establish an account on our platform, request a demo on our website, or request Services directly from us) * Third parties acting on your behalf (e.g., a financial advisor) * Vendors who assist us in our Services, such as medical record retrieval services | * Inception/rendering of Services for you * Compliance/security monitoring | * Vendors we engage in order to perform operations and our Services * Insurance carriers whose products you seek to purchase |
| Other Unique Identifiers | * Account number * Username/password * Insurance policy number | * You (*e.g.,* if you establish an account on our platform, request a demo on our website, or request Services directly from us) * Third parties acting on your behalf (e.g., a financial advisor) | * Inception/rendering of Services for you * Compliance/security monitoring | * Vendors we engage in order to perform operations and our Services * Insurance carriers whose products you seek to purchase |
| Medical Data | * Medical conditions * Prescription drugs | * You (*e.g.,* if you establish an account and/or request Services directly from us) * Third parties acting on your behalf (e.g., a financial advisor) * Vendors who assist us in our Services, such as medical record retrieval services | * Inception/rendering of Services for you * Compliance/security monitoring | * Vendors we engage in order to perform operations and our Services * Insurance carriers whose products you seek to purchase |
| Individual Attributes | * Marital status * Race * Gender * Age, height, weight | * You (*e.g.,* if you establish an account on our platform, or request Services directly from us) * Third parties acting on your behalf (e.g., a financial advisor) * Vendors who assist us in our Services, such as medical record retrieval services | * Inception/rendering of Services for you * Compliance/security monitoring | * Vendors we engage in order to perform operations and our Services * Insurance carriers whose products you seek to purchase |
| Financial Information | * Credit card and billing information * Insurance account numbers * Information deemed nonpublic information under GLBA | * You (*e.g.,* if you establish an account on our platform, purchase an insurance product through us) * Third parties acting on your behalf (e.g., a financial advisor) | * Inception/rendering of Services for you, including payment for services * Compliance/security monitoring | * Vendors we engage in order to perform operations and our Services |
| Internet and Technical Information | * IP address * Session cookies | * You (when you access our platform or website) | * Operate, assess activity on, and improve our platform or website * Assist with the functionality of the platform | * Vendors we engage in order to perform operations and our Services |
| Policy information | * Application to purchase insurance products * Documentation for policy quotes * Policy quotes * Existing policy information | * You (*e.g.,* if you request Services directly from us) * Third parties acting on your behalf (e.g., a financial advisor) * Insurance carriers whose products you seek to purchase | * Inception/rendering of Services for you * Compliance/security monitoring | * Vendors we engage in order to perform operations and our Services * Insurance carriers whose products you seek to purchase |
| Children’s Data | * Beneficiary information * Data collected about children in consumer’s household | * You (*e.g.,* if you purchase an insurance product through us) * Third parties acting on your behalf (e.g., a financial advisor) | * Inception/rendering of Services for you | * Vendors we engage in order to perform operations and our Services * Insurance carriers whose products you seek to purchase |
| Professional or Educational Information | * Occupation, job title * Employment history * Education history | * You (*e.g.,* if you establish an account on our platform, or seek employment with us) * Third parties acting on your behalf (e.g., a financial advisor) | * Inception/rendering of Services for you * Employment * Compliance/security monitoring | * Vendors we engage in order to perform operations and our Services * Insurance carriers whose products you seek to purchase |
| Individual Profiles | * Inferred data (propensities, attributes) * Demographic data * medical conditions | * You, when you establish an account with us | * Inception/rendering of Services for you | * Vendors we engage in order to perform operations and our Services * Insurance carriers whose products you seek to purchase |
| Commercial Information | * Insurance products purchased * Services obtained | * You (*e.g.,* if you seek to purchase insurance products through us) * Third parties acting on your behalf (e.g., a financial advisor) | * Inception/rendering of Services for you | * Vendors we engage in order to perform operations and our Services |