**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

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| 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
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