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<th>Examples / Description</th>
<th>Categories of Sources of PI</th>
<th>Business or Commercial Purpose for Collection of PI</th>
<th>Categories of third parties with whom we share the PI</th>
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| **Contact Information** | • Employee ID  
  • Account name/number  
  • Insurance policy number  
  • Mailing address  
  • Email address  
  • Telephone and fax numbers  
  • Contact information for related individuals (household or job) | • Directly from you (e.g., when you submit an application or make an inquiry to a service center)  
  • From third parties acting on your behalf (e.g. a financial advisor)  
  • Employer Clients,  
  • Insurance carriers and third-party agents/brokers | • Quotation/ Inception of service  
  • Policy Administration/ Claims Processing  
  • Provide services to you  
  • Compliance/ security monitoring and screening  
  • Communicate with you about our products and Services | • Insurance carriers and third-party agents / brokers (e.g. for quotes or placement services)  
  • Vendors that we engage in connection with the services  
  • Our affiliates in connection with services provided to you or in which you have expressed an interest |
| **Government issued identifiers** | • Social security number  
  • Driver’s license number  
  • State identification card number  
  • Passport number  
  • Benefits recipient number | • Directly from you (e.g., when you submit an application or make an inquiry to a service center)  
  • From third parties acting on your behalf (e.g. a financial advisor)  
  • Insurance carriers and third-party agents/brokers | • Quotation/ Inception of service  
  • Policy Administration/ Claims Processing  
  • Provide services to you  
  • Compliance/ security monitoring and screening | • Insurance carriers and third-party agents / brokers (e.g. for quotes or placement services)  
  • Vendors that we engage in connection with the services |
| **Other unique identifiers** | • Employee ID  
  • Account name/number  
  • Insurance policy number  
  • Username/password | • Directly from you (e.g., when you submit an application or make an inquiry to a service center)  
  • From third parties acting on your behalf (e.g. a financial advisor)  
  • Insurance carriers and third-party agents/brokers | • Quotation/ Inception of service  
  • Policy Administration/ Claims Processing  
  • Provide services to you | • Insurance carriers and third-party agents / brokers (e.g. for quotes or placement services)  
  • Vendors that we engage in connection with the services |
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| Individual Attributes | • Marital status  
• Race  
• Religion  
• National origin  
• Veteran status  
• Gender  
• Age  
• Physical or mental disability  
• Sexual orientation  
• Beneficiaries/Dependents | • Directly from you (e.g., when you submit an application or make an inquiry to a service center)  
• From third parties acting on your behalf (e.g. a financial advisor)  
• Insurance carriers and third-party agents/brokers | • Quotation/ Inception of service  
• Policy Administration/ Claims Processing  
• Provide services to you | • Insurance carriers and third-party agents/brokers (e.g. for quotes or placement services)  
• Vendors that we engage in connection with the services |
| Internet & Technical Information | • IP address  
• Data from cookies, web beacons, etc.  
• Server log records including page requests | • Indirectly from you (e.g., when you interact with our websites) | • To operate, assess activity on, and improve our websites and the services they support, including the Service | • Vendors who help us operate, assess, and improve the performance of our website |
| Financial Information | • Insurance account numbers  
• Consumer reporting data, credit scores  
• Data collected by a financial institution subject to GLBA (NPFI)  
• CLUE (Comprehensive Loss Underwriting Exchange) reports | • Directly from you (e.g., when you submit an application or make an inquiry to a service center)  
• From third parties acting on your behalf (e.g. a financial advisor)  
• From third parties that provide access to such information (e.g., a credit reporting agency)  
• Insurance carriers and third-party agents/brokers | • Quotation/ Inception of service  
• Policy Administration/ Claims Processing  
• Provide services to you  
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| Policy Information | - Policy documentation or information submitted in order to obtain quotes  
- Quotes provided | - Directly from you (e.g., when you submit an application or make an inquiry to a service center)  
- From third parties acting on your behalf (e.g. a financial advisor)  
- Insurance carriers and third-party agents/brokers | - Quotation/ Inception of service  
- Policy Administration/ Claims Processing  
- Provide services to you  
- Communicate with you about our products and Services | - Insurance carriers and third-party agents/brokers (e.g. for quotes or placement services)  
- Vendors that we engage in connection with the services |
| Educational Information | - Student educational records | - Directly from you (e.g., when you submit an application or make an inquiry to a service center)  
- From third parties acting on your behalf (e.g. a financial advisor)  
- Insurance carriers and third-party agents/brokers | - Quotation/ Inception of service  
- Policy Administration/ Claims Processing  
- Provide services to you  
- Compliance/ security monitoring and screening | - Insurance carriers and third-party agents/brokers (e.g. for quotes or placement services)  
- Vendors that we engage in connection with the services |
| Professional or employment-related Information | - Occupation /Title  
- CV/work history  
- HR records (comp, benefits, training, performance, etc.) | - Directly from you (e.g., when you submit an application or make an inquiry to a service center)  
- From third parties acting on your behalf (e.g. a financial advisor)  
- Insurance carriers and third-party agents/brokers | - Quotation/ Inception of service  
- Policy Administration/ Claims Processing  
- Provide services to you  
- Compliance/ security monitoring and screening | - Insurance carriers and third-party agents/brokers (e.g. for quotes or placement services)  
- Vendors that we engage in connection with the services |
| Children’s Data | - Beneficiary information  
- Data collected about children in the household (data about children’s use of family accounts, etc.) | - Directly from you (e.g., when you submit an application or make an inquiry to a service center)  
- From third parties acting on your behalf (e.g. a financial advisor)  
- Insurance carriers and third-party agents/brokers | - Quotation/ Inception of service  
- Policy Administration/ Claims Processing  
- Provide services to you  
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| Commercial Information | • Purchase history  
• Service records  
• Personal property  
• Customer service records  
• Communication preferences  
• Consumer history/trends  
• Payment preferences  
• Market research, survey data  
• Consumer account information and data collected for qualification | • Directly from you (e.g., when you submit an application or make an inquiry to a service center)  
• From third parties acting on your behalf (e.g. a financial advisor)  
• Insurance carriers and third-party agents/brokers | • Quotation / Inception of service  
• Policy Administration / Claims Processing  
• Provide services to you | • Insurance carriers and third-party agents/brokers (e.g. for quotes or placement services)  
• Vendors that we engage in connection with the services |
| Criminal and motor vehicle records | • Motor vehicle reports | • From third-party authorities and companies that provide access to such information (e.g., a state department of motor vehicles) | • Quotation / Inception of service  
• Policy Administration / Claims Processing  
• Provide services to you  
• Compliance / security monitoring and screening | • Insurance carriers and third-party agents/brokers (e.g. for quotes or placement services) |
| Individual profiles | • Inferred data (propensities, attributes)  
• Demographic data  
• Interests, hobbies  
• Professional interests | • Directly from you (e.g., when you submit an application or make an inquiry to a service center)  
• From third parties acting on your behalf (e.g. a financial advisor)  
• Indirectly from you (e.g., when you interact with our websites)  
• Insurance carriers and third-party agents/brokers | • Quotation / Inception of service  
• Policy Administration / Claims Processing  
• Provide services to you  
• Communicate with you about our products and Services | • Insurance carriers and third-party agents/brokers (e.g. for quotes or placement services)  
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