



## PRIVACY POLICY

We, at Steven Cohen Insurance Agency Inc. (SC Insurance) try to maintain the highest standards of confidentiality in dealing with client information and adhere to the Personal Information Protection and Electronic Documents Act (“PIPEDA”), a federal privacy law and any provincial privacy laws and regulations that apply.

1. Accountability – We, at SC Insurance, are accountable for the personal information we receive from our clients and will abide by the principles of PIPEDA in safeguarding that information in hard copy and computer documents.

2. Collection Purposes, Limitations on Collection, Use, Disclosure and Retention – Any and all personal (including medical), corporate, financial and related information is collected, used and retained for the purposes of establishing a file, providing ongoing advice and service and meeting insurers’ need for specific information in connection with your application for insurance. We confidentially convey your personal information to insurers either directly or through wholesale organizations, including Managing General Agencies. We only collect and keep information that helps formulate advice including personal, financial and health information.

3. Consent – The nature of the work we do at SC Insurance means we must receive and retain a lot of personal information about our clients including health data, financial data and identity verification. We use this information to provide recommendations for your situation and to identify possible solutions to any problems you might have. In becoming a client of SC Insurance, you agree to give us this information, allow us to share this information with our suppliers and wholesale organizations and allow us to retain it in paper and electronic files for as long as you wish to be a client of SC Insurance or we have a business need to retain the information.

4. Information Accuracy – SC Insurance relies on receiving accurate information in order to make appropriate recommendations. You may review the personal information we retain about you upon request. We will also update the information regularly in an effort to ensure we are making recommendations about your situation based on the correct information.

5. Safeguards – All the written information SC Insurance receives from you is either in secure filing cabinets or in password protected computer files. Any computer files stored off site are encrypted or locked. Old files that are discarded are shredded or otherwise completely destroyed. We understand the sensitivity of this information and the importance of protecting it.

6. Questions, Concerns and Access – You may contact anyone at SC Insurance at any time by telephone, email or letter at the address shown on this page about your files with me and request changes. You may review PIPEDA online at [www.privcom.gc.ca](http://www.privcom.gc.ca). If you have any complaints about our procedures we will investigate and provide you with a response as soon as practical. A full copy of my Privacy Policy is available upon request.

7. Communicating Electronically In the normal course of business, SC Insurance may communicate with you through electronic means such as email. Please let us know immediately if do not approve of said method of communication.