



PLANSOURCE PRIVACY POLICY

PlanSource Benefits Administration, Inc. ("PlanSource") takes your privacy very seriously. We share a commitment to protect your privacy and the confidentiality of your personal information.

HIPAA Privacy Practices: To read more about our privacy practices regarding health and medical information under the Health Insurance Portability and Accountability Act ("HIPAA"), please read our HIPAA Privacy Policy <http://www.plansource.com/legal/HIPAA-Privacy-Policy.pdf>.

This Policy is provided to help you better understand how we at PlanSource obtain, use, share, and protect your personal information. As a provider of services to you as a client, we often collect personal and sometimes sensitive information. Protecting the confidentiality of that information has been and will continue to be, a top priority at PlanSource. We believe that you should know about the information we collect, the measures we take to safeguard it, and the situations in which we might share information.

Your Personal Information

The information we collect and the extent to which we use it will vary depending on the service involved. We collect only the information necessary to consistently deliver responsive services to you as the client. Information we collect may include, but is not necessarily limited to, the following: your name, address, phone number, social security number, age, sex, information regarding your assets and income, employment status, dependent information, and other information provided on plan applications and related forms .

Collecting your Personal Information

The information above may be obtained from you using various methods which may include information in writing or e-mail, during telephone or internet transactions, or from data gathering software when you are completing information on the PlanSource website. Non-public personal information may also be collected through your transactions with our contracted representatives, affiliates, and others.

Protecting Your Personal Information

We have implemented and maintain physical, electronic, and procedural safeguards to protect your non-public personal financial information. We use and share your non-public personal financial information to the extent minimally necessary and only with those employees who use your information as a means to service your account. They are required to respect the confidentiality of all client information. We also require each unaffiliated third party with whom we contract to assist in servicing your account to agree to abide by safeguards and privacy standards that are the same or substantially similar to those followed by PlanSource.

The privacy and security of your non-public personal information will be maintained beyond the termination of your relationship with PlanSource.

Sharing Personal Information

First and foremost, we do not sell lists of our clients, nor do we disclose client information to marketing companies.

Where reasonably necessary, we may share any of your non-public personal information we obtain with affiliated and unaffiliated third parties as otherwise permitted or required by law. For example, we may share your information to protect against or prevent fraud, or in response to a subpoena, court order, judicial process, or regulatory authorities.

We may also share information about you with our service providers, affiliates, and representatives to help us service your accounts. Our service providers, affiliates, and representatives may include PlanSource contracted carriers, brokers and third party services providers. The information provided to these service providers, affiliates, and representatives may include the categories of information described above under "Your Personal Information," and is limited to the information that we deem appropriate for these third parties to carry out their functions.

We will not intentionally collect any personal information from children under the age of 13 through this website without receiving verifiable parental consent. If you think that we have collected personal information from a child under the age of 13 through this website, please contact us.



Changes to this Privacy Policy

We may change this Privacy Policy. If we do so, such change will appear on this page of our website. We will also provide appropriate notice and choices to you, on this website and in other appropriate locations, based on the scope and extent of changes. You may always visit this policy to learn of any updates.

Contact Us

If you have any questions regarding this Privacy Policy, you may contact us at info@plansource.com or by telephone at (877) 735-0468.

Effective Date

The Effective Date of this Privacy Policy is September 1, 2013.