



THE  
BURTON  
GROUP

# Privacy Policy

At The Burton Group, we know that the privacy of your personal and financial information is important to you. We are committed to safeguarding the privacy of your information and want you to know the protective measures we take.

## Non-Public Information We Collect

We collect certain non-public information from you or third parties when you enroll for coverage or purchase an insurance policy from us. In particular, we collect information from:

- ❖ You, on applications or other forms. Personal and financial information we may collect include your name, address, social security number, phone number, earnings, employment, tax withholding, payments of premiums, and submission of claims.
- ❖ Third parties, including doctors, employers, and other insurers. Information we collect may include medical records, employment history, and claim history.
- ❖ Credit reporting agencies, insurance reporting agencies, government agencies, and medical information providers.

## Information Security

We maintain physical, electronic, and procedural security measures that comply with applicable legal and regulatory standards to safeguard your non-public personal information. Access to such information is restricted to those employees who are trained in the proper handling of client information and have a legitimate business need to access that information.

## Information We Disclose

The Burton Group makes every effort to maintain your absolute privacy. If information is ever viewed by another party, it is purely accidental. We shall not be liable for any unlawful acts of others who acquire this information through any means. Affiliated and non-affiliated third parties may be given access to your information only as permitted by law upon your express authorization to process the transaction which you have engaged us to perform. This information will be provided to the insurance company when you purchase an insurance policy so they can establish you as a policyholder. The insurance company's use of that information will be covered by the insurance company's privacy policy.

## Notice of Insurance Information Practices

Personal information about you, including information from a credit report and loss history may be collected from persons other than you in connection with this application for insurance and subsequent policy renewals. You have the right to review your personal information in our files and can request correction of any inaccuracies. Such information as well as other personal and privileged information collected by us or our agents may in certain circumstances be disclosed to third parties without your authorization to assist in servicing your account.

Any person who knowingly and with intent to defraud any insurance company or another person files an application for insurance or statement of claim containing any materially false information, or conceals for the purpose of misleading information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime and subjects the person to criminal and (NY: substantial) civil penalties. (Not applicable in CO, HI, NE, OH, OK, OR, or VT; in DC, LA, ME, TN, VA and WA, insurance benefits may also be denied).

## Our Commitment

This privacy policy applies to our current and former customers. Because privacy is important, we pledge to work with you to protect and safeguard the security of your personal customer information. We reserve the right to change this Privacy Policy without providing you with advance notice of our intent to make the changes.

If you have any questions, you may contact us by email at [info@BurtonTrust.com](mailto:info@BurtonTrust.com), by phone at 812-334-4000, or by mail at 5015 W State Road 46, Suite J, Bloomington, IN 47404.