



## Privacy Policy Notice

### What you need to know

Balancing Risk / Managing Business



As a current or prospective customer of Axis Insurance Services, LLC, we would like to take this opportunity to both thank you for your business and to share with you the importance our agency places upon protecting the privacy of information we gather from you in accordance with applicable state and federal laws.

#### Collection of Information:

We collect personal/confidential information; written, in-person, telephone, facsimile, electronically and online, for the purpose of soliciting quotations and negotiating with Insurance Carriers on behalf of our clients. Personal/Confidential information includes but is not limited to such information as name, address, policy or claim information, financial or other information as may be required by our underwriters. We collect personal information about you from the following sources:

- Applications or other forms such as claims forms or underwriting questionnaires completed by you;
- Information about your transactions with us, our affiliates or others; and
- Independent information from public sources such as the internet or governmental agencies.

#### Disclosure of Information:

We do not share information about our customers or former customers with nonaffiliated third parties other than as permitted or required by law. For example, Axis Insurance Services, LLC may share all of the information listed above with nonaffiliated third parties for, including but not limited to, the following reasons:

- Information that is necessary to service or process the insurance needs of our clients, in a manner that is consistent with the usual and customary services provided by independent insurance agents. Such usual and customary services of processes provided by Axis Insurance Services, LLC to its customers include but are not limited to underwriting, obtaining renewal terms, rating, placement and providing quotes for insurance that is germane to the coverage the customer places with our agency.
- Information that is necessary to protect the confidentiality or security of our client's records.
- Information that is necessary to resolve client disputes or inquiries.
- Information that is required by individuals or entities who are assessing our legal compliance.
- Information that is required for Axis Insurance Services, LLC to comply with the law.
- Information that is necessary to protect against or prevent fraud, unauthorized transactions, claims or other liability

#### Protection of Information:

Axis Insurance Services, LLC maintains physical, electronic and procedural safeguards that comply with state and federal regulations to protect the confidentiality of your personal information.

Axis Insurance Services, LLC appreciates your business and in order to continue building upon that relationship we believe it is necessary, not only from a legal standpoint, but also as a sound business practice, that our customers understand the care our agency uses in handling your information. Axis Insurance Services, LLC will continue to monitor the effectiveness of this privacy policy.

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In California and Texas DBA NJ Axis Insurance Services, LLC. In New York DBA NJ Axis Insurance Agency.