



To Clients of Pacific Benefit Planners: Our Privacy Pledge

We value you as a client and respect your right to privacy. We want you to understand what information we collect and how we use it. We pledge our commitment to treat your information responsibly. We know that you purchase our services because you trust that we will stand behind our promises.

In order to provide our clients with a broad range of insurance products and services as effectively and conveniently as possible, we use technology to manage and maintain client information. We maintain strict policies and security controls to assure that client information in our computer systems and files is protected. We restrict access to your information to those who need it to perform their jobs.

We comply with all policies and procedures of carriers and companies with whom we do business to secure the products you purchase. We sign an agreement with each carrier and company that acknowledges our commitment to understand and follow their privacy policies. We also comply with all of the Security Exchange Commission and FINRA compliance rules, regulations and procedures through regular reporting and onsite security measures inspections by our Broker Dealer.

We do not sell your information. We disclose your information as required or permitted by law. We disclose information to business partners who perform services for us and for you. We disclose it for legal or regulatory purposes. These include the information we receive from you on applications or other forms. This may include your name, phone number, address, beneficiaries, Social Security number, and family member information. This may also include assets, income, and the property address and value.

We sometimes must collect medical information to provide you a product or to service a claim. We do not use it or share it, internally or externally, for any purpose except for the following:

- Obtaining underwriting of insurance,
- Administering your policy, account, or claim,
- As required or permitted by law, or
- As otherwise authorized by you.

Thank you for choosing Pacific Benefit Planners. We value our clients and want you to understand and trust how we use your information. If you have any questions about our privacy policy, you may contact us at 541-341-3478 or 503-223-3638. We look forward to building a lifetime relationship with you.

This privacy statement describes our privacy practices for both current and former clients. We will provide one copy of this notice to each account; please share this information with everyone covered by your account.

For related privacy information: www.dol.gov/ebsa/compliance_assistance.html#section4
www.consumer.gov/idtheft or 1-877-438-4338.