



Privacy Policy

For over fifty years, Liftman Insurance has been providing insurance to the investment community. To continue to provide our customers with comprehensive insurance products and superior service, Liftman Insurance collects certain information about you and your business which is outlined below. Be assured that Liftman Insurance will always respect the privacy of our clients. Our information handling practices are regulated by law, and this Privacy Policy describes those practices.

Categories of Information We Collect

Liftman Insurance collects information about you and/or your business to perform services that are normal to an insurance agency, offer new insurance products, and meet legal and regulatory requirements. We may collect the following categories of information about you and your business from the following sources:

- Information from you directly, including but not limited to information from applications, worksheets, questionnaires, claims forms or other documents.
- Information about your transactions with us, present or past insurance carriers or others (such as products or services purchased, claims made, account balances and payment history).
- Information from a reputable consumer or business reporting agency.
- Information from other non-Liftman Insurance sources (such as prior loss information and demographic information).
- Information given by you on the Liftman Insurance web site (such as that provided through our online forms). Liftman Insurance does not use information-collecting devices known as "cookies" on its web site.

Under What Circumstances Do We Disclose Information

Liftman Insurance does not disclose any non-public information about our clients or former clients and their clients to anyone except as permitted by law. This means that under certain circumstances information can be disclosed to third parties without your authorization. For example, Liftman Insurance may disclose the information we collect to insurance carriers; to consultants who perform business or insurance functions for us; to independent claims adjusters, investigators and attorneys who need information to settle your claim; to businesses that provide underwriting and actuarial support; to consumer and business reporting agencies that provide us with necessary underwriting information; to organizations involved in collecting data to help in the detection of insurance fraud or criminal activity in connection with insurance transactions; to law enforcement or

other governmental authorities to protect our legal interests or in cases of suspected fraud or illegal activities; to insurance rating organizations or state regulatory agencies who are involved with the regulation of insurance pricing and products; to other parties who have a legal interest in your policy; to authorized individuals as ordered by court documents; and to others necessary for Liftman Insurance to carry out the normal functions of an insurance agency.

This also means that Liftman Insurance may disclose information as permitted by law to third parties for the purpose of marketing Liftman Insurance products and services to you or your company.

Confidentiality and Security of Personal Information

Access to your information is allowed for business purposes only. Liftman Insurance maintains standard physical, electronic and procedural safeguards to guard your information. Where Liftman Insurance is entitled by law to provide information to a third party, we will enter into a contractual agreement which requires the third party to use such information only for the specific purpose for which it is disclosed and to maintain the confidentiality of such information.

Information of Former Clients

Liftman Insurance's information privacy policy also applies to former clients.

Changes in Privacy Policy

Liftman Insurance may choose to modify its privacy policy at any time.

Access to Your Information

You have the right to obtain certain items of information we have collected about you or your company, and to request correction of the information if you feel it is inaccurate. If we agree, we will correct our records accordingly. If we do not agree, we will communicate this to you. You should submit your written request to us at Liftman Insurance, 101 Federal Street, 22nd Floor, Boston, MA 02110-1827. Certain information collected in connection with, or in anticipation of, any legal claim or proceeding will not be made available.