



Privacy Policy Notice

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| FACTS | WHAT DOES CPR FINANCIAL & INSURANCE SERVICES, INC. DO WITH YOUR PERSONAL INFORMATION? |
| Why? | Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do. |
| What? | The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> • Social Security number and financial information • Account balances and transaction history |
| How? | All financial companies need to share customer's personal information to run their everyday business. In the section below, we list the reasons financial companies can share their personal information; the reasons We choose to share; and whether you can limit this sharing. |

| Reasons we can share your personal information | Does CPR share? | Can you limit this sharing? |
|---|-----------------|-----------------------------|
| For our everyday business purposes— such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus. | YES | NO |
| For our marketing purposes— to offer our products and services to you | NO | N/A |
| For joint marketing with other financial companies | NO | N/A |
| For our affiliates' everyday business purposes— information about your transactions and experiences, credit worthiness and to market to you | YES | NO |
| For non-affiliates to market to you | NO | N/A |
| For buying, selling, or sharing of client data gathered for text messaging. | NO | N/A |

Who we are

Who is providing this notice?

CPR Financial & Insurance Services, Inc.

What we do

How does CPR Financial & Insurance Services, Inc. **protect my personal information?**

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.

How does CPR Financial & Insurance Services, Inc. **collect my personal information?**

We collect your personal information when you engage our services and we gather information to provide your services. We may also collect your personal information from others, such as affiliates or other companies.

Why can't I limit all sharing?

Federal law gives you the right to limit only

- sharing for affiliates' everyday business purposes— information about your creditworthiness
- affiliates from using your information to market to you
- sharing for non-affiliates to market to you

State laws and individual companies may give you additional rights to limit sharing.

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

Non-affiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

Other important information

Questions?

Call 877-431-6997