
OUR COMMITMENT TO PROTECTING YOUR PRIVACY

We are committed to protecting the privacy and confidentiality of the personal information you entrust to our care.

We assure you that your personal information is handled according to our Privacy Policy for the collection, use and disclosure of your personal information, which must be followed by all IAG employees, our business partners and third-party service providers or authorized representatives we contract with.

To provide you with the highest quality insurance advice, products and services, it is necessary for us to collect and use personal information.

In our industry, such information is essential to conducting business with you. It is our commitment to you that we will not share your personal information indiscriminately.



THE INSURANCE ADVISORY GROUP INC.



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To Learn More About Our Privacy Policy,
Please Visit Our Website:
www.iagi.ca/compliance

Toronto Head Office

510-67 Yonge Street
Toronto, Ontario M5E 1J8
Tel: (416) 363-0078

Calgary Office

Bow Valley Square 1
610-202 6th Avenue SW
Calgary, Alberta T2P 2R9
Tel: (587) 393-2810

Montreal Office

Tél: (514) 348 9422

Or reach us by email at:
inquiry@iagi.ca



THE INSURANCE ADVISORY GROUP INC.

PRIVACY POLICY

CLIENT FOCUSED.
RESULTS DRIVEN.



COMMITTED TO
PROTECTING YOUR PRIVACY

1. Why we collect, use and retain your personal information

When you request or obtain any product or service from IAG, we need certain personal information. The information is used to evaluate insurance risk, to determine eligibility, to administer insurance products or to adjudicate or manage claims.

Anonymous data is sometimes used to prepare reports and statistics, for the purpose of providing the best products and service for the best value, to manage our business and monitor the changing needs of our clients.

2. We will only obtain the information we need

We will only collect information that is pertinent and necessary to the effective conduct of our business.

3. How we collect your personal information

Whenever practical, your information will be collected directly from you. We also collect information about you through our authorized representatives or third-party service providers.

Other sources of information may include insurers or financial institutions, government and governmental agencies, your employer, or your plan administrator. We will in some cases ask an independent source to verify and supplement personal information.

Where health information about you is required, we may collect such information directly from you or from sources, such as your doctor, health care professional or hospital.

4. Your consent is needed

We will collect, use and disclose personal information only with your consent, or as otherwise required or allowed by law. Your consent may be express or implied, as appropriate. You may withdraw your consent at any time, subject to legal or contractual restrictions and considerations. However, certain personal information is essential for us to provide you with products and services.

We will endeavor to ensure you understand why we need your information and how it will be used.

5. We will limit the use and disclosure of your personal information

We will limit the use and disclosure of your personal information within IAG, contracted business partners and your insurers. From time to time, we may find it necessary to share some of your information with authorized representatives or third-party service providers in order to provide you with the product or services you need or have requested.

As part of our customer service relationship with you, we may use your personal information to offer products, information or services provided by IAG, insurers, or business partners, which we believe to be of value and of interest to you. We will not distribute or sell any personal information to third parties for marketing purposes.

The use and disclosure of your personal information shall be done only to the extent necessary to perform our duties, to provide you with high-quality service and information designed to meet your ongoing insurance and financial needs, or where such use and disclosure is required by our contractual obligations or by law.

6. We will limit the length of time we retain your personal information

The length of time we retain your personal information may vary depending on the product or service that we provide to you and the nature of the information. We will retain your personal information only for as long as required by the purposes for which it was collected, or as otherwise required or allowed by law.

7. We are committed to accuracy

We will keep your personal information as accurate, complete and up-to-date as necessary. You have a right to challenge the accuracy and completeness of the personal information we retain, and if it is

inaccurate or incomplete, we will make the necessary correction or amendment. If there is a disagreement or discrepancy with regard to an issue of accuracy, this error will be noted on your file and any applicable third parties will be notified.

8. We will protect your personal information

We have developed and continue to enhance security measures and procedures designed to protect your personal information from unwarranted intrusion, theft, accidental release, loss or unauthorized disclosure, use, copying or modification. When we destroy your personal information, we will use appropriate safeguards.

9. Your right to access your information

With satisfactory verification of your identity, we will provide you with the information you request. If your request is made through a third party, we will need satisfactory proof of your consent and authorization to release information to that party and we will ensure their entitlement to such information.

There are certain legal exceptions to your right of access. Should your request fall into such a category, we will inform you of the reason for not providing access and any recourse you may have. Generally, we will provide access to medical information only through the appropriate health care professional.

If You Have Any Questions or Requests

If you have any questions or concerns about the use or security of your personal information with IAG, please contact one of our Privacy Officers:

Guy Bentley, President **Lori Bentley, Operations**

Tel: (416) 363-0072

Tel: (416) 363-0075

Email: gbentley@iagi.ca

Email: lbentley@iagi.ca
