

Doran Independent Insurance LLC

~ Health, Life and Long Term Care ~

PRIVACY POLICY

Our Commitment to Privacy

Doran Independent Insurance, LLC recognizes that our relationships with current and prospective clients are based on integrity and trust. Your privacy is our priority and your relationship with us is our most important asset. We understand that you have given us personal and private financial information and we do everything possible to maintain its' integrity. We are committed to maintaining the confidentiality and security of client information.

Information We Collect

Doran Independent Insurance, LLC collects and uses various types of information to better understand the needs of its current and prospective clients.

- We do receive your personal information during our normal business practices so that we can evaluate your situation, work with you to achieve your goals and service you better.
- We often receive information from you through completion of forms and/or applications, telephone conversations, via e-mail and/or written correspondence.
- We may receive information from a third party with your express consent. This information may include contract and/or account values as well as general contract and/or account information (i.e. ownership and beneficiary designations).

Information We Share

Except as noted below, Doran Independent Insurance, LLC does not share your information. Any information you provide to the representatives of Doran Independent Insurance, LLC will be used for the express purposes of Doran Independent Insurance, LLC. If you decide to terminate your relationship with Doran Independent Insurance, LLC we will adhere to these same privacy policies and practices.

- We do not sell your personal or financial information to anyone.
- We may share information with third parties such as insurance companies when it is necessary to establish your accounts or policies and/or to service those same accounts or policies.
- We may share information when it is required or permitted by law. For example, information may be shared to protect you against fraud or with someone who has a legal or beneficial interest such as your power of attorney or in response to a subpoena.

~ Referrals Appreciated ~

603-569-6464 * Fax 603-569-8664

64 Center Street * PO Box 70 * Wolfeboro Falls, NH 03896

www.DoranIndependentInsurance.com

Information Security

When Doran Independent Insurance, LLC shares non-public client information as referred to above, this information is made available for limited purposes and under controlled circumstances designed to protect your privacy. We require third parties to comply with the same standards of security and confidentiality. We do not permit use of your information for any other purpose. Doran Independent Insurance, LLC maintains significant physical, electronic and procedural safeguards to protect your non-public personal information.

Employee Access to Information

All employees of Doran Independent Insurance, LLC must adhere to our confidentiality and privacy policies as well as our Code of Ethics. Employee access to client information is authorized for business purposes only. The degree of access is based on the sensitivity of the information and on the employee's need for the information to service the client's account or policy or to comply with legal requirements as associated with Doran Independent Insurance, LLC.

E-Mail

We feel that e-mail is an important form of communication between Doran Independent Insurance LLC and its clients. We will communicate with our clients from time to time in the form of e-mail. If you opt to receive communications from Doran Independent Insurance, LLC via e-mail, our policy requires all e-mail include a disclaimer. We will not accept e-mail (as the sole communication method) to process transactions or provide personal account information.

Changes to our Privacy Policy

Doran Independent Insurance, LLC reserves the right to modify or remove any portions of this privacy statement at any time. We will notify you in advance of any changes that may affect your rights under this policy statement.

Comments and Questions

If you have comments, questions or concerns about our Privacy Policy, you may contact us at (info@doranindependentinsurance.com)

This policy was last updated on December 31, 2013