



**Wilson Baum Agency, Inc.**  
**314 Long Run Road**  
**McKeesport, PA 15132**

## **IMPORTANT NOTICE**

### **WILSON BAUM AGENCY, INC. PRIVACY POLICY**

At Wilson Baum Agency, Inc., we value you as a customer and share your concerns about privacy. We hope that this notice, which describes our use and protection of nonpublic personal information, (“Customer information”), will help you understand how we treat the customer information that we obtain from you or other sources in the course of providing you with products and services.

We want you to know that Wilson Baum Agency, Inc. respects your privacy and protects your information.

We do NOT sell customers information.

We do NOT share customer information with persons, companies or organizations outside of Wilson Baum Agency, Inc. that would use that information to contact you about their own products and services.

We expect persons or organizations that provide services on our behalf, if any; to keep customer information confidential and use it only to provide the services we’ve asked them to perform.

Within Wilson Baum Agency, Inc., we communicate regarding the need to protect your information to those individuals who may have access to it, and we’ve established physical, electronic and procedural safeguards to protect customer information.

Below we’ve provided answers to questions that might be on your mind regarding privacy. You may be wondering...

#### **What kind of customer information do we have and where did we get it?**

Much customer information that we have about you comes directly from you. You gave some of this information to us on your application or request for insurance or other products we offer. We keep information about types of products and services you purchase from us, as well as some account balances and payment history.

Depending on the nature of the transaction you are completing with us, you may be asked to provide information to Wilson Baum Agency, Inc. The kinds of information you may be asked to provide could include; information we receive from you on applications or other forms, such as your name, address, social security number and information about your transactions with us for example, your policy coverage, premiums and payment history.

We may also collect information from outside sources, including consumer reporting agencies and health care providers. This information includes loss information records, motor vehicle reports, credit reports and medical information.

### **What we do with customer information?**

Wilson Baum Agency, Inc. does not sell customer information to anyone. Nor do we share it with companies or organizations outside Wilson Baum Agency, Inc. that would use that information to contact you about their own products and services. If that practice were ever to change, we would of course offer you the ability to opt out of that type of information sharing and would offer you the opt out with plenty of time for you to respond before the change in our practice took effect.

To help you with your overall insurance program, we may use the customer information for marketing purposes. We may also use customer information to communicate with you about products, features and options you have expressed an interest in or that we believe may be of interest to you. To transact business on your behalf, we may find it necessary to provide customer information, without authorization, but only as permitted or required by law, to persons both inside and outside Wilson Baum Agency, Inc. These include for example: Companies that perform marketing services on our behalf and your agent or broker.

### **How do we protect customer information?**

When we share customer's information with companies working on Wilson Baum Agency, Inc.'s behalf, we expect those companies to use that information only to provide the services we have asked them to perform. Within Wilson Baum Agency, Inc., customer information is available to those individuals who may need to see that information to fulfill and service the needs of Wilson Baum Agency, Inc.'s customers. We communicate regarding the need to protect customer information to all employees and agents, especially those individuals who have access to it. Plus, we have established physical, electronic and procedural safeguards to protect customer information.

Finally, should your relationship with Wilson Baum Agency, Inc. end, your customer information will remain protected in accordance with our privacy practices as outlined in this important notice.

### **How can you find out what information we have about you?**

You may request to either see or obtain from us, by mail, the customer information about you in our records. If you believe that information is incomplete or inaccurate, you may request that we make any necessary corrections, additions or deletions to the disputed customer information or a consumer reporting agency to copy and disclose customer information to you on your behalf. You may request a more complete description of the entities to which we disclose customer information, or the circumstances that might warrant such disclosures. Please send in writing any requests listed above to:

Wilson Baum Agency, Inc.  
Attn: Robert W. Baum  
314 Long Run Road  
McKeesport, PA 15132

We hope you have found this Important Notice helpful. If you have any questions or would like more information, please do not hesitate to contact us as outlined above.