



Privacy Statement

At Robertson Insurance and Financial Services, integrity and trust are our core values. We are, and always have been, committed to the protection of our client's confidentiality.

Privacy Policy

Why do we collect personal information?

Doing business with us involves providing information about yourself, so protection of your personal information is one of our highest priorities. Our office has a solid track record of respecting your right to privacy and safeguarding your personal information.

As a result of federal legislation, we've further strengthened our privacy commitment by informing you of why and how we collect, use and disclose your personal information. You can be assured that we'll only handle your personal information in a manner that a reasonable person would consider appropriate in the circumstances.

When you first become a client and whenever you inquire about a new product from us, we need to collect some of your personal information. Common purposes for which we collect your personal information are to:

- Enable us to provide you with a quote regarding an insurance policy
- Purchase of an investment product
- Assist you and assess your ongoing needs for insurance
- Assess your need for other Financial Services or Estate Planning products
- Ensure your information is accurate and up-to-date
- Protect us both against error or fraud

What personal information do we collect?

Personal information is information that identifies you as an individual client and relates specifically to you. Depending on the purpose(s) for which we need to collect it, we may ask for the following personal information about you including:

- Basic information such as your name, address, telephone and fax numbers, e-mail address, birth date and marital status
- SIN number
- Current, past and historical medical information
- Banking information
- Financial Information
- Questions regarding your family for Estate Planning purposes including copy of your Will
- Beneficiary Designation
- Employment information

Personal Information **does not include** your job title, telephone number or address, anything that might appear on your business card or can be found through publicly available information such as the telephone book.

We may obtain this information from:

- You
- Insurance companies
- Financial institutions
- Accounting and Legal firms
- Medical professionals

Who do we disclose your personal information to?

For many of the purposes identified above, we will need to share your personal information with others in order to serve your needs. These other parties commonly include:

- Insurance companies
- Medical professionals

How do we protect your personal information?

In order to protect your personal information and right to privacy, we will:

- Not collect, use or disclose your personal information for any purpose other than those that we identified to you
- Keep your personal information only for as long as we need to fulfill the stated purpose or as required by law
- Maintain your personal information in as accurate, complete and up-to-date a form as possible
- Safeguard your personal information to the best of our ability
- Respond to any request you may make to access or correct the personal information we hold about you
- Obtain the appropriate consent from you for the collection, use or disclosure of your personal information

CONSENT

- We may obtain your express consent or we may determine that consent has been implied by the circumstances
- We might ask you for your express consent in writing, for example in a signed consent or application form
- We may ask for your express consent in person or over the telephone
- We may determine that by seeking insurance through our organization, your consent has been implied for us to deal with your personal information in a reasonable manner

There are also legal exceptions in which we will not need to obtain your consent or explain the purposes for the collection, use or disclosure of your personal information. For example, this could apply when there is an emergency situation, or if it is necessary for your protection or ours. **You** can control how we handle your personal information.

We want you to know that you do have choices in this matter. You could refuse to allow us to obtain, use or share your personal information or you could also withdraw a previously given consent at any time. However, by doing that, depending on the situation, you may be limiting or even preventing our ability to provide you with the product or service you desire.

CONTACT INFORMATION AND RESOURCES

We are committed to treating you with respect and courtesy, and to providing the highest level of service.

Please contact our Privacy Officer at the address below if you:

- Wish to access your personal information
- Wish to change your consent to the ways in which we may collect, use or disclose your personal information
- Have any other questions about our privacy policies, wish to obtain a copy of our Personal Information & Procedures Handbook, or request additional information.

PRIVACY OFFICER

Ellen Heine

395 Wellington Rd South

London, ON N6C 5Z6

We will respond to you promptly and do our utmost to resolve your concerns. To find out more about federal privacy laws, please contact the Office of the Privacy Commissioner at 1-800-282-1376 or visit their website at www.privcom.gc.ca.