



PlanConnect, LLC

Privacy notice

Our commitment to privacy

PlanConnect® provides administrative support for employee retirement plans and other general support. As such, we may acquire personal information about individual plan participants. Please be assured we are committed to keeping all personal information about plan participants confidential and secure. This privacy notice describes how we collect, use, and disclose personal information and how we protect the privacy of participants in employee retirement plans.

Information we collect about you

We collect personal information about plan participants as needed to administer employee retirement plans and other general support. The information we may collect or be provided about plan participants may include, but is not limited to:

- Name, date of birth, address, email address, phone number
 - Social Security number
 - Employment information
 - Information about contributions made to the retirement plans
 - Details about how contributions are invested
 - Other information relating to employee participation in the retirement plan, such as employee loans and withdrawals
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How we use personal information

- We only use the personal information we have about employee retirement plan participants to administer employee retirement plans or to facilitate other general support.
 - We require all personnel and vendors providing services for us to keep personal information about plan participants confidential.
 - We do not sell or rent personal information about plan participants to third parties or share information with third parties for the purpose of cross-context behavioral advertising.
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Sources we collect information from

We may collect personal information from the following sources:

- Plan participants
- Employers and plan sponsors of plan participants
- Plan administrators
- Other retirement plan service providers

How your information will be shared

We may disclose personal information that we collect only when necessary to:

- Plan participants
- Employers and plan sponsors of plan participants
- Plan administrators
- Our service providers and affiliates
- Government agencies and others as required or permitted by law

Security of your information

We have implemented security programs that are designed to protect personal information about plan participants from unauthorized use or disclosure. Access to personal information is limited only to those who need it to enable us to administer employee retirement plans or facilitate general support. We will keep personal information about plan participants confidential even if they no longer participate in their retirement plans, and will use and disclose it only in accordance with this privacy notice or as otherwise required by law.

Privacy policy changes

PlanConnect® may update this privacy notice in the future. If we make material changes to this privacy notice, we will post a copy of the revised privacy notice on our website.

Questions?

If you have questions about this privacy notice, you may contact PlanConnect® customer service center for third-party administration toll-free at (800) 923-6669, or for other services toll-free at (888) 234-5148.

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