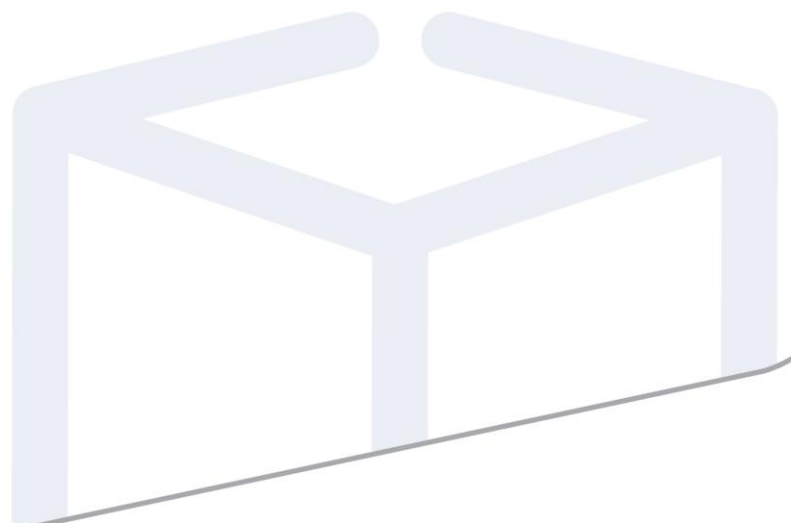


# PlanConnect Privacy Policy





PlanConnect, LLC

## Privacy Policy

We provide administrative support for employee retirement plans. As such we may acquire personal information about individual plan participants. Please be assured that we are committed to keeping all personal information about plan participants confidential and secure. This policy describes how we protect the privacy of participants in employee retirement plans.

### **Our Privacy Pledge**

- We only use the personal information we have about employee retirement plan participants to administer employee retirement plans.
- We will not sell or rent personal information about plan participants to other companies.
- We require all personnel and vendors providing services for us to keep personal information about plan participants confidential.

### **Keeping Your Files Secure**

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 to those who need it to enable us to administer employee retirement plans. We will keep personal information about participants confidential even if they no longer participate in their retirement plans.

### **Information We Collect About You**

We collect personal information about plan participants as needed to service employee retirement plans. The information we may collect about plan participants may include:

- name, age, address, phone number and Social Security number
- employment information
- information about contributions made to the retirement plans
- details about how contributions are invested, and
- other information relating to employee participation in the retirement plan, such as employee loans and withdrawals.

### **Who We Obtain Information From and Share Information With**

We may obtain personal information about individual plan participants from plan participants themselves, from their employers, from plan administrators, and from other retirement plan service providers.

Personal information about individual plan participants may be disclosed to the individuals themselves, their employers, plan administrators, and other service providers.



We may also disclose information about you to government agencies and others as required or permitted by law.

### **Privacy Policy Changes**

We may make changes to this privacy policy in the future. Before we do, we will notify the employers who sponsor the plans we administer and post a copy of the revised privacy policy on our website.

### **To Contact Us**

Questions? Call the PlanConnect<sup>®</sup> Customer Service Center toll-free at (800)-923-6669.