

## **CPRA** Collection Matrix

| Categories of<br>Sensitive PI<br>Collected and/or<br>Processed | Categories of<br>Personal Data Shared<br>with Third Parties | Examples/ Description<br>of Sensitive Pl   | Categories of Sources<br>of SPI  | Business or<br>Commercial Purposes<br>for Collecting, Selling,<br>or Sharing Sensitive<br>Pl  | Categories of 3 <sup>rd</sup><br>Parties to whom We<br>Disclose SPI   | Is this Sensitive<br>Personal Information<br>Sold OR Shared?   |
|--|---|--|--|---|---|--|
| Contact Information  | Contact Information   | <ul> <li>Postal address</li> <li>Contact information<br/>for related<br/>individuals<br/>(household or job)</li> <li>Account name/<br/>number</li> <li>Email address</li> </ul>  | <ul> <li>Directly from you<br/>(e.g., when you<br/>submit an<br/>application or make<br/>an inquiry to a<br/>service center)</li> <li>From third parties<br/>acting on your<br/>behalf (e.g. a<br/>financial advisor)<br/>Employer Clients</li> <li>Insurance carriers<br/>and third-party<br/>agents/brokers</li> </ul> | <ul> <li>Quotation/Inceptio<br/>n of Service</li> <li>Policy<br/>administration/clai<br/>ms processing</li> <li>Provides services<br/>to you</li> <li>Compliance/securit<br/>y monitoring and<br/>screening</li> <li>Communications<br/>with you about our<br/>products and<br/>services</li> </ul> | <ul> <li>Insurance carriers<br/>and 3<sup>rd</sup> party<br/>agents/brokers</li> <li>Vendors we<br/>engage in<br/>connection with the<br/>services</li> <li>Our affiliates in<br/>connection with<br/>services provided<br/>to you or in which<br/>you have<br/>expressed an<br/>interest.</li> </ul> | • We do not sell<br>information to any<br>third parties for<br>monetary or other<br>valuable<br>consideration. We<br>do share with third<br>parties, and may<br>engage in targeted<br>advertising                            |
| Government Issued<br>Identifiers                               | Government Issued<br>Identifiers                            | <ul> <li>Social security<br/>number</li> <li>Driver's license<br/>number</li> <li>State identification<br/>card number</li> <li>Passport number</li> </ul>   | <ul> <li>Directly from you<br/>(e.g., when you<br/>submit an<br/>application or make<br/>an inquiry to<br/>service center)</li> <li>From 3<sup>rd</sup> parties<br/>acting on your<br/>behalf (e.g.,<br/>financial advisor)</li> <li>Insurance carriers<br/>and 3<sup>rd</sup> party<br/>agents/brokers</li> </ul>       | <ul> <li>Quotation/inceptio<br/>n of services</li> <li>Policy<br/>administration/clai<br/>ms processing</li> <li>Provide services to<br/>you</li> <li>Compliance/securit<br/>y monitoring and<br/>screening</li> </ul>  | <ul> <li>Insurance carriers<br/>and 3<sup>rd</sup> party<br/>agents/brokers</li> <li>Vendors that we<br/>engage in<br/>connection with the<br/>services</li> </ul>  | <ul> <li>We do not sell<br/>information to any<br/>third parties for<br/>monetary or other<br/>valuable<br/>consideration. We<br/>do share with third<br/>parties, and may<br/>engage in targeted<br/>advertising</li> </ul> |
| Other Unique<br>Identifiers                                    | Other Unique<br>Identifiers                                 | <ul> <li>Account<br/>name/number</li> <li>Username/passwor<br/>d</li> <li>Genetic Data</li> <li>Biometric data and<br/>processing of same</li> <li>Personal Health<br/>Information</li> <li>Precise<br/>Geolocation</li> </ul> | <ul> <li>Directly from you</li> <li>From 3<sup>rd</sup> parties<br/>acting on your<br/>behalf</li> <li>Insurance carriers<br/>and 3<sup>rd</sup> party<br/>agents/brokers</li> </ul>   | <ul> <li>Quotation/inceptio<br/>n of services</li> <li>Policy<br/>administration/clai<br/>ms processing</li> <li>Provide services to<br/>you</li> </ul>   | <ul> <li>Insurance carriers<br/>and 3<sup>rd</sup> party<br/>agents/brokers</li> <li>Vendors that we<br/>engage in<br/>connection with the<br/>services</li> </ul>  | <ul> <li>We do not sell<br/>information to any<br/>third parties for<br/>monetary or other<br/>valuable<br/>consideration. We<br/>do share with third<br/>parties, and may<br/>engage in targeted<br/>advertising</li> </ul> |

| Other Unique<br>Identifiers (cont'd) |  | Contents of<br>consumer's mail,<br>email, or text   |  |  |  |   |
|--------------------------------------|--|---|--|--|--|---|
| Individual Attributes                | Individual<br>Attributes               | <ul> <li>Race</li> <li>Religion</li> <li>Philosophical<br/>beliefs</li> <li>National Origin</li> <li>Physical or Mental<br/>Disability</li> <li>Sexual Orientation</li> <li>Protected<br/>classification<br/>characteristics</li> <li>Beneficiaries/Depe<br/>ndents</li> <li>Citizenship/Immigra<br/>tion Status</li> </ul> | <ul> <li>Directly from you</li> <li>From 3<sup>rd</sup> parties<br/>acting on your<br/>behalf</li> <li>Insurance carriers<br/>and 3<sup>rd</sup> party<br/>agents/brokers</li> </ul>   | <ul> <li>Quotation/inceptio<br/>n of services</li> <li>Policy<br/>administration/clai<br/>ms processing</li> <li>Provide services to<br/>you</li> </ul>  |  | <ul> <li>We do not<br/>sell<br/>information to<br/>any third<br/>parties for<br/>monetary or<br/>other valuable<br/>consideration.</li> <li>We do share<br/>with third<br/>parties, and<br/>may engage<br/>in targeted<br/>advertising</li> </ul> |
| Internet & Technical<br>Information  | Internet &<br>Technical<br>Information | <ul> <li>messages, unless<br/>the business is the<br/>intended recipient</li> </ul>   | Indirectly from you  | To operate, assess<br>activity on, and<br>improve our<br>websites and the<br>services they<br>support, including<br>the Service  | Vendors who<br>provide support on<br>operating,<br>assessing, and to<br>improve the<br>performance of our<br>websites.   | <ul> <li>We do not sell<br/>information to any<br/>third parties for<br/>monetary or other<br/>valuable<br/>consideration. We<br/>do share with third<br/>parties, and may<br/>engage in targeted<br/>advertising</li> </ul>                      |
| Financial Information                | Financial<br>Information               | <ul> <li>Debit Card or<br/>Credit Card<br/>numbers in<br/>combination with<br/>any required<br/>security or access<br/>code, password, or<br/>credentials</li> <li>Financial Account<br/>log-in information</li> </ul>  | <ul> <li>Directly from you</li> <li>From 3<sup>rd</sup> parties<br/>acting on your<br/>behalf</li> <li>From 3<sup>rd</sup> parities<br/>that provide access<br/>to such information</li> <li>Insurance carriers<br/>and 3<sup>rd</sup> party<br/>agents/brokers</li> </ul> | <ul> <li>Quotation/inceptio<br/>n of services</li> <li>Policy<br/>administration/clai<br/>ms processing</li> <li>Provide services to<br/>you</li> <li>Compliance/securit<br/>y monitoring and<br/>screening</li> </ul> | <ul> <li>Insurance carriers<br/>and 3<sup>rd</sup> party<br/>agents/brokers</li> <li>Vendors that we<br/>engage in<br/>connection with the<br/>services</li> </ul> | <ul> <li>We do not sell<br/>information to any<br/>third parties for<br/>monetary or other<br/>valuable<br/>consideration. We<br/>do share with third<br/>parties, and may<br/>engage in targeted<br/>advertising</li> </ul>                      |
| Policy Information                   | Policy Information                     | <ul> <li>Policy<br/>documentation or<br/>information<br/>submitted in order<br/>to obtain quotes</li> </ul>   | <ul> <li>Directly from you</li> <li>From 3<sup>rd</sup> parties<br/>acting on your<br/>behalf</li> <li>From 3<sup>rd</sup> parities<br/>that provide access<br/>to such information</li> <li>Insurance carriers<br/>and 3<sup>rd</sup> party<br/>agents/brokers</li> </ul> | <ul> <li>Quotation/inceptio<br/>n of services</li> <li>Policy<br/>administration/clai<br/>ms processing</li> <li>Provide services to<br/>you</li> <li>Compliance/securit<br/>y monitoring and<br/>screening</li> </ul> | <ul> <li>Insurance carriers<br/>and 3<sup>rd</sup> party<br/>agents/brokers</li> <li>Vendors that we<br/>engage in<br/>connection with the<br/>services</li> </ul> | <ul> <li>We do not sell<br/>information to any<br/>third parties for<br/>monetary or other<br/>valuable<br/>consideration. We<br/>do share with third<br/>parties, and may<br/>engage in targeted<br/>advertising</li> </ul>                      |

| Commercial<br>Information | Commercial<br>Information | <ul> <li>Consumer account<br/>information and<br/>data collected for<br/>qualification</li> <li>Payment<br/>preferences</li> </ul> | <ul> <li>Directly from you</li> <li>From 3<sup>rd</sup> parties<br/>acting on your<br/>behalf</li> <li>Insurance carriers<br/>and 3<sup>rd</sup> party<br/>agents/brokers</li> </ul>                              | <ul> <li>Quotation/inceptio<br/>n of services</li> <li>Policy<br/>administration/clai<br/>ms processing</li> <li>Provide services to<br/>you</li> </ul>  | <ul> <li>Insurance carriers<br/>and 3<sup>rd</sup> party<br/>agents/brokers</li> <li>Vendors that we<br/>engage in<br/>connection with the<br/>services</li> </ul> | <ul> <li>We do not sell<br/>information to any<br/>third parties for<br/>monetary or other<br/>valuable<br/>consideration. We<br/>do share with third<br/>parties, and may<br/>engage in targeted<br/>advertising</li> </ul> |
|---------------------------|---------------------------|--|---|--|--|--|
| Criminal Records          | Criminal Records          | Background<br>Checks   | <ul> <li>From 3<sup>rd</sup> party<br/>authorities and<br/>companies that<br/>provide access to<br/>such information</li> </ul>   | <ul> <li>Quotation/inceptio<br/>n of services</li> <li>Policy<br/>administration/clai<br/>ms processing</li> <li>Provide services to<br/>you</li> <li>Compliance/securit<br/>y monitoring and<br/>screening</li> </ul> | <ul> <li>Insurance carriers<br/>and 3<sup>rd</sup> party<br/>agents/brokers</li> </ul>   | • We do not sell<br>information to any<br>third parties for<br>monetary or other<br>valuable<br>consideration. We<br>do share with third<br>parties, and may<br>engage in targeted<br>advertising                            |
| Individual Profiles       | Individual Profiles       | Demographic data   | <ul> <li>Directly from you</li> <li>From 3<sup>rd</sup> parties<br/>acting on your<br/>behalf</li> <li>Indirectly from you</li> <li>Insurance carriers<br/>and 3<sup>rd</sup> party<br/>agents/brokers</li> </ul> | <ul> <li>Quotation/inceptio<br/>n of services</li> <li>Policy<br/>administration/clai<br/>ms processing</li> <li>Provide services to<br/>you</li> <li>Compliance/securit<br/>y monitoring and<br/>screening</li> </ul> | <ul> <li>Insurance carriers<br/>and 3<sup>rd</sup> party<br/>agents/brokers</li> <li>Vendors that we<br/>engage in<br/>connection with the<br/>services</li> </ul> | We do not sell<br>information to any<br>third parties for<br>monetary or other<br>valuable<br>consideration. We<br>do share with third<br>parties, and may<br>engage in targeted<br>advertising                              |