

Privacy Policy

At Wagner Insurance & Financial, Inc., maintaining our clients' trust and confidence is vital. That is why we want to protect your privacy when we collect and use information about you, and why we take measures to safeguard that information.

We want you to know that your privacy concerns are important to us; and in accordance with law we are supplying you with this privacy statement. Chapter INS 25 of the Wisconsin Administrative Code generally prohibits any licensees of the Office of the Commissioner of Insurance, directly or through its affiliates, from sharing nonpublic personal information about you with a non-affiliated third party unless the institution provides you with a notice of its privacy policies and practices, such as the type of information it collects about you and the categories of persons or entities to whom it may be disclosed. In compliance with the Wisconsin Administrative Code, we are providing you with this document, which notifies you of the privacy policies and practices of our company.

Our Privacy Policies and Practices

Information we collect: As part of providing you with insurance products and related services, we obtain nonpublic personal information about you including:

Information we receive from you on applications or other forms, such as your name, address, telephone number, age, social security number, driver's license number;

Information about your transactions with us, our affiliates or others;

Information we receive from third parties, such as a consumer reporting agency;

Information we receive from governmental sources, such as Motor Vehicle Records

Information we may disclose to third parties: We may disclose the following kinds of nonpublic personal information about you:

Your name, address, social security number, drivers license number, telephone number, as may become necessary during an insurance related transaction, such as a claim;

Information about your transactions with us, such as your policy coverage or premiums, such as when requested to verify coverage by your lender or lessor.

Non-affiliated third parties to whom disclosures may be made: We may disclose nonpublic personal information about you only to financial service providers, such as insurance companies, surplus lines insurance agencies, mortgagees, leasing companies, and commercial lenders. We may also disclose nonpublic personal information about you to non-affiliated third parties as permitted by law. Disclosures which are permitted by law include, but are not limited to, disclosures which are necessary to service your insurance policies, process claims, and process transactions which you request, such as issuing certificates of insurance. We do not sell or otherwise make your nonpublic personal information available to non-affiliated third parties for general sales and marketing purposes.

Opt Out Notice: If you prefer that we not disclose nonpublic personal information about you to non-affiliated third parties, you may opt out of those disclosures. That is, you may direct us not to make those disclosures (other than disclosures permitted by law). If you wish to opt out of disclosures to non-affiliated third parties, you may call our office at (608) 798-3811. Please understand that if you choose this option, certain of your transactions with us may be delayed.

Our practices regarding information confidentiality and security: We restrict access to nonpublic personal information about you to those employees who need to know that information in order to provide products and services to you. We maintain physical, electronic, and procedural safeguards that comply with federal and state regulations to guard your nonpublic personal information. Reservation of the right to disclose information in unforeseen circumstances: In connection with the potential sale or transfer of its interests, Wagner Insurance & Financial, Inc., reserves the right to sell or transfer your information (including but not limited to your name, age, sex, address, zip code, state and country of residency and other information that you provide through other communications) to a third party entity which (1) concentrates its business in a similar practice or service; (2) agrees to be Wagner Insurance & Financial, Inc. successor in interests with regard to the maintenance and protection of the information collected; and (3) agrees to the obligations of this privacy statement.

Amendment to Privacy Notice and Privacy Policy: We reserve the right to amend, modify or change at any time and for any reason, our privacy policies and this Privacy Notice. In any such events, we will provide an amended Privacy Notice to you.

Sincerely,

Wagner Insurance & Financial, Inc.