Privacy, Ownership and Disclosure Statement - BACKGROUND

BrokerLink is committed to our customers and insurance industry associates to be transparent regarding our ownership. The Oral Statement must be read and authorization provided by the prospect. If the client does not consent to the collection and disclosure of personal information for the purposes of providing a quote, we will not quote and must destroy any information we have obtained.

If they do not wish to have marketing material sent to them, when setting up the prospective client in EPIC, choose "Do Not Market" in the Marketing field to indicate that the client does not want to receive marketing material.

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Oral Statement:

PRIVACY, OWNERSHIP and DISCLOSURE STATEMENT – CASL

To comply with privacy legislation, I have a statement to read and two questions to ask before we start.

To assess your insurance requirements and to serve you as a customer, we need to obtain relevant personal information about you. Some of this information will come from you and some will come from third parties such as your previous insurance company or driver licensing authority. To provide you with the most accurate quote, we may need to share some of this information with prospective insurance companies. Do I have your permission to proceed?

We would also like your permission to contact you by email to communicate with you about your insurance coverage, share helpful insurance tips and ask for your feedback. You may withdraw your consent at any time. BrokerLink's Privacy Promise can be viewed at www.brokerlink.ca. Do I have your permission to proceed?

As a brokerage we're pleased to offer you a choice of insurance solutions from different providers. One such provider is Intact Insurance. We'd like you to know that both Intact Insurance and BrokerLink are owned by Intact Financial Corporation.

At this point, we should present our written Disclosure Statement (required in Ontario), which also identifies the markets we place business with and the compensation arrangements in place with each of them. There is no need to revisit the matter later when presenting the quote and obtaining the consumer's agreement to place coverage.