

LIFETRUST, LLC
PRIVACY AND CONFIDENTIALITY POLICY

LIFETRUST, LLC, (“LIFETRUST”) (also referred to in this Policy as the “Company”) in the normal course of its business practices collects and may maintain nonpublic personal information (“NPI”); which may, without limitation, include sensitive personal and medical information, about prospective clients, and clients. Information may be collected from the following sources: applications and other forms you completed and provided to the Company; information you authorize the Company to receive from authorized third parties (i.e.; medical service providers, insurance companies, or others); other written or oral information provided by you; and information we may request from a consumer-monitoring agency.

Information collected is used to determine if the Company will extend a consumer line of credit. LIFETRUST and its employees and contractors are committed to maintaining your privacy while NPI is in the Company’s possession. The Company, its employees, contractors and third party service providers are allowed to use your NPI exclusively for LIFETRUST business purposes.

LIFETRUST utilizes various tools (i.e.; procedural safeguards, electronic monitoring, physical controls and/or restrictions) to protect NPI, restrict disclosure and access to employees within the Company, contractors, affiliates or third party service providers, who have a legitimate need-to-know such information in order to conduct its business and deliver the services you have requested. The Company will not share your NPI with non-affiliated third parties except as you have authorized in written form, as permitted or required by law, or as required to conduct its business and provide the services you have requested.

All employees of LIFETRUST, third party service providers and contractors are required, to sign written confidentiality agreements to protect your NPI. Third party service providers or affiliated businesses are also required to comply with LIFETRUST’s policies and procedures and to abide by applicable laws, protecting and maintaining the confidentiality of NPI regardless of the form of the information held in their possession (i.e.; hard copy, image or in electronic media form).

LIFETRUST records containing NPI periodically are disposed of, modified, erased, or otherwise made undecipherable and/or unreadable. The Company may also dispose of NPI by contracting with a third party vendor in the business of disposing of confidential information.

LIFETRUST is dedicated to protecting your NPI. The Company pledges to take all appropriate measures to maintain your information in a confidential, secure, and private manner.

Acknowledgement:

Date: _____

(Signature)

(Please Print Your Name)