

# **CHOICE ONE PROPERTIES BROKER PRIVACY POLICY**

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## **Introduction**

As a valued customer, we understand that the privacy and confidentiality of your personal information is of the utmost importance to you. We respect and share your desire to maintain that confidentiality. In an attempt to eliminate any fears you may have with respect to sharing that information, this document sets forth our Broker's policy and commitment to you regarding the types of information we collect, our use of that personal information, and our efforts undertaken to protect that information.

## **Background**

We collect and retain certain personal and financial information pertaining to you because we reasonably believe such information will enable our Brokerage to deliver those services necessary to meet your goals. That information may include sensitive financial data, which is protected under the Gramm-Leach-Bliley Act governing the use and collection of such information for financial and real estate settlement purposes. In addition, we may request other personal information from you that is not publicly available.

We do not sell any personal information about you. During the normal course of our business, however, we may need to share your personal information with legitimate third-parties. For example, we may share this information when: (1) the information is necessary for the completion of a transaction, (2) in order to verify the condition of your credit status or accounts with that third-party, (3) in order to comply with a governmental agency or pursuant to a court order, (4) upon your consent for personal reasons, or (5) as permitted or authorized by law.

## **Policy**

### **1. Definition s**

(a) Personal Information - Any documents or electronic files containing information relative to the Client's finances, including, but not limited to the following: statements for any accounts held with any financial institution, any revolving and/or credit card accounts, and information regarding mortgages, promissory notes or loans, FICO scoring results and credit histories, background checks, social security numbers, tax returns, addresses, electronic mail addresses, and phone numbers.

(b) Broker - The real estate brokerage with which the Client has entered into a real estate services agreement, inclusive of all agents and employees of that brokerage.

(c) Client - The undersigned client of Broker.

### **2. Storing of Personal Information**

(a) Physical Documents - Any and all physical documentation containing Personal Information will be kept in file cabinets and/or file rooms that are capable of being locked by the Broker. Those documents must be kept in such a manner reasonably intended to preclude any unauthorized third-party from obtaining access to the physical documents.

(b) Electronic Files - Any and all Personal Information kept in electronic format must be stored on a computer and/or electronic server that is password protected and only accessible by the Broker. Those electronic files must be kept in such a manner reasonably intended to preclude any unauthorized third-party from obtaining access to the electronic files.

**3. Transmission of Personal Information**

(a) Electronic Mail - Any and all electronic mail containing Personal Information communicated to any legitimate third-party shall be done in such a manner as to avoid the interception of that communication. Specifically, Broker shall take such steps as are reasonable to ensure that any e-mail transmitted is to the correct third-party, and contains the following language " "The contents of this email are private and confidential. To that end, if you believe you have received this email in error, you are advised to immediately delete this email and contact the sender."

(b) Facsimile (fax) - Any and all facsimiles containing Personal Information communicated to any legitimate third-party shall be done in such a manner as to avoid the interception of that communication. Specifically, Broker shall take such steps as are reasonable to ensure that any facsimile transmitted is to the correct third-party, and contains a cover page with the following language: "The contents of this facsimile are private and confidential. To that end, if you believe you have received this facsimile in error, you are advised to immediately destroy these documents and contact the sender." That cover page shall not identify or disclose any of the Personal Information contained in the facsimile.

(c) Third-Parties -- With respect to any third-party, Broker shall ensure that prior to transmittal of personal information that third-party has consented to be bound by the terms of this document or is already bound by its equivalent.

**4. Destruction of Files**

Upon the termination of Broker's relationship with the Client, Broker shall destroy and/or delete those Physical Documents and Electronic Files containing Personal Information of the Client that Broker is not otherwise required to retain by law.

**5. Notice to Clients**

Upon any breach of the security of the Client's Personal Information, Broker shall immediately inform the Client so that the Client may take such remedial steps as are necessary to protect the Client. Broker shall take any and all additional actions reasonably required to protect Client.

**6. Waiver and Release of Information**

By virtue of this document, the Client has been informed of those policies, procedures and actions undertaken by Broker to protect the Client's Personal Information. Client understands, acknowledges and agrees that, notwithstanding the best efforts of Broker, certain information may be obtained by non-parties to this agreement. In no event shall client hold Broker liable for the criminal acts of anyone whomsoever in seeking or obtaining Personal Information.