

## Declaration of consent for data processing, release from confidentiality as well as contact / advertising

### 1. Overview and content of this statement

You would like us to advise you on your insurance matters, a loan and/or your financial investments, or to have us arrange such a product for you. At the same time, we look after and manage your contracts in this area at your request. We have jointly defined the exact scope of our work for you in our brokerage contract. In this document, we explain the processing of your data and give you the opportunity to consent to various data processing.

In addition, the following declarations of consent are also relevant for you if you are not a contract holder, but an insured person, for example.

In order to be able to fulfil your order, we need your personal data (hereinafter referred to as 'the following') "Data"). This data is processed, for example, in the following cases:

- Data collection
- Consultations
- Consulting documentation
- Advance risk enquiries
- Contract application or conclusion
- Enquiries to product providers
- Contract support

If necessary, your data will also be forwarded to product providers (such as insurance companies, investment companies, banks, building societies). We will give you an insight into the list of insurers.

We are already legally permitted to process your data as part of the performance of the contract. So much for that "special categories of personal data" (for example, your health data, biometric and genetic data) or we pass on data to third parties, we require your consent or release from confidentiality. These third parties are in particular broker pools, intermediaries, sub-brokers and product providers, which are explained in more detail in Section 2 b. You can give the following consents and/or releases from confidentiality within the framework of this document:

- Processing special categories of your personal data by us (see section 2(a));
- Involvement of broker pools, other so-called intermediaries and sub-intermediaries who support us in our brokerage activities (see Section 2 b);
- Data transfers and release from confidentiality about you from product providers, such as insurers, to us or a broker pool / intermediary / sub-broker (see section 2 c);
- Any transfer of data to our legal successor (see Section 2 d).

You are free to give or not to give the consents/releases from confidentiality in this document and to revoke them at any time later **via one of the above-mentioned contact options with effect for the future**. However, the existence of consent / release from confidentiality may be a prerequisite for us to be able to fulfil the order you have placed. The specific restrictions that may result from non-submission or revocation are explained separately in the respective section.

In our data protection information/privacy policy, which we make available to you separately, we inform you in detail about the processing of your data that we carry out.

If terms are used in this declaration that are also used in the European General Data Protection Regulation (GDPR), the definitions therein apply, which you can read in particular in Article 4 GDPR.

## 2. Your consents and releases from confidentiality

### a. Consent to our processing of special categories of personal data

Within the framework of the brokerage contract, we process your data in order to broker the contracts you want, to advise you and/or to look after your contracts. There is a legal permission for this data processing within the framework of the performance of the brokerage contract.

However, some insurance products, especially in the areas of life, health and accident insurance, also require the processing of data that is particularly protected due to its sensitivity, such as your health data and genetic data. The exact data involved depends on the specific application or the preliminary risk enquiry. Such processing is carried out in particular in the context of checking your state of health when you submit your application and advance risk enquiries. In the case of a preliminary risk enquiry, your information will be collected on risk-relevant circumstances in the field of life or health insurance, such as your state of health, your profession or your hobbies. We pass this on to various insurers. The respective insurers will then check whether and under what conditions they would like to conclude an insurance contract with you.

If you wish, we may use an "electronic signature procedure" to process your transaction digitally. An electronic signature can be used to identify the declaration you are signing. To enable this assignment, biometric features of your signature (such as writing speed, direction, pauses, angle and proof) are processed. This processing is carried out exclusively for the purpose of verifying the authenticity of your signature.

#### Your consent under data protection law to this:

I consent to the processing of my special categories of personal data by my broker for the execution of the brokerage contract, if necessary using my electronic signature, as described above. This expressly includes the transmission of my data, including the special categories of personal data, to insurers, insofar as this is necessary in each case for the purpose of advising, arranging and examining my application or preliminary risk enquiry as well as for the support of my contracts.

I am aware that without my consent, the execution of the brokerage contract with me is not possible or only possible to a limited extent, and that the brokerage contract may have to be terminated due to impracticability.

### b. Involvement of broker pools, other intermediaries and sub-intermediaries

In order to be able to offer you as many comparison options and products as possible, we may use the support of so-called "broker pools". Broker pools support affiliated brokers (like us) in initiating contracts. This includes, in particular, obtaining comparative tariffs and offers. However, this also includes support in the possible establishment and execution of contracts between you and product providers, as well as in communication with the product providers.

If necessary, we also make use of further support from "intermediaries". By this we mean, for example, broker networks and transaction platforms (especially in the banking sector). Intermediaries have the task of bundling and/or providing information or products and establishing contacts between suppliers and buyers. These intermediaries support us, for example, by establishing access to product providers or offering coverage concepts.

If we engage a broker pool or intermediary, it is necessary that your data is exchanged and processed directly between them and us. Depending on the contract, this processing may also concern, for example, special categories of personal data. This is the case, for example, with life, health and accident insurance. If the electronic signature procedure is used, your biometric data will also be processed as described in Section 2 a.

If necessary, we also use "sub-intermediaries" for support, advice and mediation. They process your data for the same purpose and scope as we do. This also includes the exchange of data with the broker pools and/or intermediaries.

We will inform you about the list of business partners made available to you for broker pools, intermediaries and other bodies to which your data may be transmitted for the fulfilment of our contractual and legal obligations.

If we transfer your data necessary for further support (including special categories of personal data) to a new party who is not named in the business partner list, we will inform you in advance. You will then have the opportunity to object to the transfer within 14 days. We will also provide you with details of your objection as part of our information.

We will be happy to provide you with a continuously updated overview of the broker pools, intermediaries and sub-brokers with whom we work on request. If necessary, you can also find this list on our homepage.

**Your consent under data protection law to this:**

I agree that my personal data, including special categories of personal data, may be shared with the broker pools, other intermediaries and/or sub-agents that my broker uses for the purposes described above. They may use the transmitted data for precisely these purposes as well as for the associated communication with the respective product providers or with each other for precisely these purposes.

This consent also applies in the event that such data is transmitted to a previously unnamed party and subsequently used by that party for the aforementioned purposes. I am aware that in this case I will be informed in advance about the specific new participant and that I can object to the transfer within 14 days, as described above.

I am aware that without my consent I may incur disadvantages in the selection of the desired product and that the execution of my order may not be possible or only possible to a limited extent.

**c. Data transmission from the product provider to us, if necessary to the broker pool and intermediary involved as well as the sub-intermediary, if a contractual relationship with the product provider is established**

If a contractual relationship is established or initiated as a result of our mediation between you and a product provider, or if we take over the management of existing contracts, we need your data for this, which is transmitted to us by the product provider. This also applies to the broker pools, intermediaries and/or sub-brokers that we engage in each case. This data can also allow conclusions to be drawn about your health (e.g. if assumed with a risk surcharge, exclusion of certain risks and so on).

Life, accident and health insurers or the persons working there are subject to the special duty of confidentiality according to §203 StGB, as you know it from your doctor or lawyer. In order for the insurer to be able to forward your protected data to the recipients described above, your release from confidentiality is required.

**Your consent under data protection law and release from confidentiality in this regard:**

I agree that my broker as well as broker pools, intermediaries and/or sub-brokers engaged by him may receive and process my data, including health data and genetic data, as well as data protected under § 203 of the German Criminal Code (StGB) from the product providers for the purpose of brokering or support. Furthermore, I release the product providers of health, life and accident insurance who are inquired about concluding a contract or the contracting product providers as well as the persons working for the product provider from their duty of confidentiality. My above explanations also extend to data from already existing contracts that were taken over by my broker for support in accordance with the order.

I am aware that without my consent, the brokerage contract will probably not be able to be carried out in this case.

**d. Data transfer to our successor**

In the event that we no longer provide support, for example in the event of business closure, a successor will need access to your data, including special categories of personal data, in order to be able to continue to provide you with complete support. Prior to such a transfer, we will inform you separately and expressly about this, as well as about the person of the successor. You will then have the option to object to the transfer. We will also provide you with details of your objection as part of our information.

**Your consent under data protection law to this:**

I agree that if support by my broker is no longer provided, data disclosed by me or received from the product providers will be passed on to the successor and the successor may use the data for the purpose of servicing my contracts and for advising me. The data may also contain special categories of personal data. The data will not be transmitted if I have objected after receiving appropriate prior information.

I am aware that without my consent, the continued care of my contracts could not be secured, and that I would then have to look for another care if necessary.

**e. Disclosure of information to third parties**

You also agree that we may provide information to your spouse/partner\*, child(ren)\*, parents\* and co-insured persons\* upon their request. (\* Please delete as applicable)

**f. Consent to contact / advertising**

Customer information and advertising cannot be separated. For example, if we want to draw your attention to the better protection of a new insurance tariff, this will be understood as advertising. Therefore, we need your consent to be able to carry out our activities.

I agree that you may contact me for advertising purposes by telephone, electronically or in writing using the contact options given below, this also applies after the termination of the contractual relationship (e.g. for customer recovery).

Telephone (landline and/or mobile):

Email:

other:

**You are free to give or not to give the consents/releases from confidentiality in this document and to revoke them at any time later via one of the above-mentioned contact options with effect for the future.**

**With the following signature, you expressly give your consent under data protection law and release from confidentiality as explained above.**

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Location, Date

Signature of the person making the declaration (from the age of 16)

Signature of the legal representative for under 16

(The preceding declarations apply to the persons legally represented by you (e.g. their children), insofar as they do not recognise the scope of this consent and are therefore unable to make their own declarations)