

# Privacy Policy

Equity Insurance Services | Last Updated: March 2026

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Welcome to our website. We value your privacy and are dedicated to protecting your personal data. This privacy policy outlines how we collect, use, store, and protect your personal data, and your rights concerning this data. We do not share your data with third parties for marketing or promotional purposes.

## 1. Data Sharing and Disclosure

**We do not share your personal data with third parties for marketing or promotional purposes.**

We may share your data with third parties only in the following circumstances:

- **Service Providers:** With third-party service providers who perform functions on our behalf, such as IT service providers, data storage providers, and telecom service providers. These providers act as data processors on our behalf and are contractually prohibited from using your data for any independent purpose, including marketing.
- **Legal Obligations:** When required by law or to respond to legal processes.
- **Protection:** To protect our rights, property, and safety, or that of our customers and others.
- **SMS Opt-In Data:** **SMS opt-in data, consent records, and phone numbers collected for text messaging purposes are never sold, shared, rented, or transferred to any third party for any purpose, including marketing. This data is used solely to deliver the messaging service described in this policy.**

## 2. Data We Collect

We collect various types of personal data, including:

- **Identity Data:** First and last name.
- **Contact Data:** Email address, phone number, billing and delivery address.
- **Technical Data:** IP address, browser type and version, timezone setting, browser plug-in types and versions, operating system and platform.
- **Usage Data:** Information about how you use our website, products, and services.
- **Marketing and Communications Data:** Your preferences in receiving marketing from us and your communication preferences.

## 3. Methods of Data Collection

We collect personal data using various methods, primarily through forms on our website:

- **Direct Interactions:** You provide your personal data when you fill out forms, create an account, subscribe to our services, request marketing materials, or give us feedback.

- **Automated Technologies:** As you interact with our website, we may automatically collect technical data about your equipment, browsing actions, and patterns. We collect this data using cookies, server logs, and other similar technologies.
- **Telephone Interactions:** When you call our office, our automated AI receptionist may collect your name, phone number, and insurance inquiry details. During this call, if you verbally confirm your consent to receive a text message, your phone number will be used to send you a transactional SMS as described below. Verbal consent is captured via call transcript and logged with a timestamp for compliance purposes. These records are retained and available upon request.

#### 4. How We Use Your Personal Data

We use your personal data for the following purposes:

- **SMS / Text Messaging Program:**

Equity Insurance Services sends transactional text messages to customers who have opted in to receive them. Consent is collected verbally during a phone call with our automated AI receptionist: the receptionist explicitly informs the caller that a text message containing an intake form link will be sent to the phone number on file, and the caller confirms their agreement before the call ends.

Messages sent under this program are strictly transactional and include: intake form links for insurance quotes, appointment confirmations, and service follow-up reminders. We do not send promotional or marketing messages through this program. SMS is used exclusively for transactional purposes. Marketing and prospecting communications are conducted via email only, never via SMS.

- **Message frequency:** Typically 1–3 messages per inquiry, based on your interaction with our services.
  - **Rates:** Message and data rates may apply.
  - **Opt-out:** Reply STOP at any time to unsubscribe. You will receive one final confirmation and no further messages will be sent.
  - **Help:** Reply HELP for assistance, or contact us at [contact@equityinsurance.services](mailto:contact@equityinsurance.services).
  - **Data protection:** Your phone number and consent data are never sold, shared, or transferred to third parties.
- **Service Provision:** To perform the contract we are about to enter into or have entered into with you.
  - **Marketing and Communications:** To send you marketing materials and communicate with you about our services.
  - **Prospecting:** To analyze your data to understand your preferences and prospect for new clients.
  - **Customer Support:** To respond to your inquiries and provide support.

#### 5. Data Storage, Maintenance, and Protection

We implement appropriate security measures to protect your personal data from being accidentally lost, used, or accessed in an unauthorized way, altered, or disclosed. These measures include:

- **Data Encryption:** Encrypting personal data to protect it from unauthorized access.
- **Access Controls:** Limiting access to personal data to authorized personnel only.
- **Regular Security Assessments:** Conducting regular security assessments to identify and mitigate potential vulnerabilities.

## 6. Your Rights

You have the following rights regarding your personal data:

- **Access:** You can request access to the personal data we hold about you.
- **Correction:** You can request correction of any incomplete or inaccurate data we hold about you.
- **Erasure:** You can request deletion of your personal data where there is no good reason for us to continue processing it.
- **Objection:** You can object to the processing of your personal data where we are relying on a legitimate interest and there is something about your particular situation that makes you want to object to processing on this ground.
- **Restriction:** You can request restriction of processing of your personal data.

## 7. Opt-Out Options

You have the right to opt out of receiving communications from us at any time:

- **SMS:** Reply STOP to any text message to unsubscribe immediately. After opting out, you will receive one confirmation message and no further texts will be sent. To re-subscribe, reply START. Reply HELP at any time for assistance. Message and data rates may apply. Additional opt-out keywords accepted: STOPALL, UNSUBSCRIBE, CANCEL, END, QUIT.
- **Email:** Clicking the "unsubscribe" link in any email you receive from us.
- **Account Settings:** Updating your preferences in your account settings on our website.

## 8. Changes to this Privacy Policy

We may change this Privacy Statement from time to time when necessary to reflect changes in our Services, how we use personal information, or the applicable law. If we make changes, we will revise the "Last Updated" date at the top of the statement. If we make material changes, we will provide you with notice or obtain consent regarding such changes as may be required by law. We encourage you to review the Privacy Statement whenever you access the Services or otherwise interact with us to stay informed about our privacy practices and the ways in which you can exercise choice over these practices. The practices described in this Privacy Statement are subject to applicable laws in the locations in which we operate.

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Equity Insurance Services | [equityinsurance.services](https://equityinsurance.services) | [contact@equityinsurance.services](mailto:contact@equityinsurance.services)