

MARSHBERRY - CALIFORNIA CONSUMER PRIVACY ACT NOTICE

Last modified on May 8, 2026

The California Consumer Privacy Act, as amended by the California Privacy Rights Act (“CCPA”) regulates how businesses handle “Personal Information,” including “Sensitive Personal Information” (as such terms are defined in the CCPA), of California residents and gives California residents certain rights with respect to their Personal Information. If you are a resident of California, we are required to inform you of how we use and disclose your Personal Information and certain rights you may have under the CCPA. This Notice constitutes our notice at collection and our privacy policy pursuant to the CCPA.

COLLECTION AND DISCLOSURE OF PERSONAL INFORMATION

The Company does not, and during the past twelve (12) months did not, “sell” or “share” Personal Information of California residents within the meaning of the CCPA. Under the CCPA, “sell” means the disclosure of Personal Information for monetary or other valuable consideration, and “share” means sharing, renting, releasing, disclosing, disseminating, making available, transferring, or otherwise communicating your Personal Information to third parties for cross-context behavioral advertising, whether or not for monetary or other valuable consideration. We do not collect any sensitive Personal Information within the meaning of the CCPA via our website.

The table below explains our practices over the past twelve (12) months related to the categories and types of Personal Information that we collect about you and the categories of third parties to whom we disclose this information.

Category of Information	Types of Personal Information	Categories of Recipients
Identifiers <i>This information may also constitute personal information as defined by Cal. Civ. Code 1798.80.</i>	Your name, email address, telephone number, and account name	Group companies, service providers in connection with customer relations management, “know your client” (KYC) systems, marketing with respect to our services, data storage, information systems, information security, compliance, IT services, event administration and calendaring services
Personal information categories listed in the California Customer Records statute.	Your name, address, telephone number, driver’s license, and insurance policy number.	Group companies, service providers in connection with customer relations management, “know your client” (KYC) systems, marketing with respect to our services, data storage, information systems, information security, compliance, IT services, event administration and calendaring services



Professional or employment related information	Title of profession, employer, professional background	Group companies, service providers in connection with customer relations management, “know your client” (KYC) systems, marketing with respect to our services, data storage, information systems, information security, compliance, IT services, event administration and calendaring services
Internet or other electronic network activity	Browsing and search history, information about your interaction with the website and with certain marketing communications we send	Group companies, service providers in connection with customer relations management, certain marketing communications we send, data storage, information systems, information security, compliance, and IT services
Audio, electronic, visual, thermal, olfactory, or similar information	Photographs, video recordings (including security camera footage and recordings of video calls), voice recordings (including call recordings)	Group companies, video conferencing providers, IT services
Sensitive Personal Information* <i>*Only as applicable and necessary for engaged clients</i>	Social security number, driver’s license number, racial or ethnic origin	Group companies, service providers in connection with customer relations management, “know your client” (KYC) systems, data storage, information systems, information security, compliance, IT services

The business purposes that we use the above Personal Information for are as follows:

- Helping to ensure security and integrity (as defined at Cal. Civ. Code § 1798.140(ac)) of our website.
- Providing advertising and marketing services to the consumer (excluding cross-context behavioral advertising), if the service provider or contractor does not combine Personal Information from the business's opted-out consumers with Personal Information received from, or on behalf of, another person or persons or that it collected independently.
- Undertaking internal research for technological development.

In addition to collecting Personal Information ourselves, we additionally coordinate with third parties to deliver advertising and marketing, including on non-affiliated persons' or entities' sites and mobile apps.

The duration for which we retain each category of Personal Information depends on several factors, including: (i) the time period required to comply with applicable legal and regulatory obligations, (ii) the time needed to fulfill the business or commercial purposes for which the Personal Information was collected, used, or disclosed (as outlined in this Notice), and (iii) whether you choose to exercise your right, subject to certain exceptions, to request the deletion of your Personal Information.

CCPA RIGHTS FOR CALIFORNIA RESIDENTS

If you are a California resident protected under the CCPA, you are entitled to the following rights:

1. **Receive this Notice** at or prior to the collection of your Personal Information.
2. **Request disclosure**, free of charge, of the following details covering the 12 months prior to your request:
 - (a) The categories of Personal Information we collected about you;
 - (b) The categories of sources from which we collected your Personal Information;
 - (c) The purposes for collecting your Personal Information;
 - (d) The categories of third parties with whom we shared your Personal Information, the categories of Personal Information disclosed (if applicable), and the reasons for disclosure;
 - (e) The specific pieces of Personal Information we have collected about you.
3. **Request correction** of any inaccurate Personal Information that we hold about you.
4. **Request deletion** of the Personal Information we collected from you, unless an exception under the CCPA applies.
5. **Be protected from discrimination** for exercising any of your rights under the CCPA.

California's "Shine the Light" law permits California residents to annually request and obtain information free of charge about what personal data is disclosed to third parties for direct marketing purposes in the preceding calendar year. We do not share personal data with third parties for their direct marketing.

HOW TO EXERCISE YOUR RIGHTS

If you are a California resident, you may submit a request by contacting the MarshBerry Compliance Team at the below.

- E-mail: compliance@marshberry.com
- Address: 28601 Chargin Blvd., Suite 400, Woodmere, OH 44122

Once we receive your request, we will review it, determine whether we can verify your identity, and process the request accordingly. We may need to collect information from you to verify your identity, such as your

email address, government issued ID, or date of birth. You may make a verifiable consumer request to access your Personal Information twice per 12-month period. We aim to fulfill all verified requests within 45 days pursuant to the CCPA. If necessary, extensions for an additional 45 days will be accompanied by an explanation for the delay.

You may designate, in writing or through a power of attorney document, an authorized agent to make requests on your behalf to exercise your rights. Before accepting such a request from an agent, we will require that the agent provide proof that you have authorized them to act on your behalf, and we may need you to verify your identity directly with us.
