

MARSHBERRY - CRM DATA PRIVACY NOTICE

Last modified on May 8, 2026

Background

In order to improve the accuracy of our database, we have decided to manage our customer data in a joint global database to be used by all Marsh, Berry & Company, LLC entities worldwide (collectively, the "MarshBerry Group"). Based on obligations under the EU General Data Protection Regulation (the "GDPR"), we are informing you about how we handle your personal data contained in our global customer relationship management database (the "CRM Database"). In this CRM Data Privacy Notice "MarshBerry", "we", "us" and "our" refers to Marsh, Berry & Company, LLC, as well as all affiliate entities and offices of MarshBerry with access to, or participate in processing, your data under this CRM Data Privacy Notice. We have detailed several frequently asked questions ("FAQs") in connection with our CRM Database as follows:

How will we use your personal data within our global CRM Database?

Your personal data is processed to help manage our customer relationships. The information is used to provide international customer support and for business communication such as newsletters and e-mails. Therefore, we process your name, postal address, e-mail address, areas of interest, event information and other business-specific data.

On what legal basis is your personal data processed?

The legal basis for processing your data within our global CRM Database is Art. 6 (1) 1 lit. f Regulation (EU) 2016/697 of the European Parliament and of the Council of 27 April 2016 (General Data Protection Regulation, GDPR) as we have a legitimate interest in efficiently managing our contacts for their use within our marketing operations.

Where do we transfer your personal data to?

We only transfer your personal data within the MarshBerry Group. If your personal data is forwarded to a country outside of the United Kingdom (UK) or European Economic Area (EEA), which is not subject to a comparable level of data protection, we will ensure that the relevant Group entities have received appropriate guarantees (e.g. by agreement to standard EU contract clauses). We may also share your personal data with external service providers who work on our behalf and are required not to use your personal data other than to provide the services requested by us or otherwise in accordance with our instructions.

How long will we keep your personal data?

We only retain your personal data for as long as necessary. Statutory retention periods are used as the criteria for how long our company archives your personal information. After the expiration of the legal retention period, such data is routinely deleted if it is no longer required to fulfill an agreement or initiate a contract.

What are your rights in relation to the processing of your personal data within our CRM Database?

Applicable data protection law grants you the following rights, if applicable:

- You can request information regarding your personal data, which we process and, if necessary, pass on to third parties;
- You have the right to request the rectification or erasure of inaccurate personal data;
- If the processing of your personal data is based on your consent, you have the right to revoke such consent at any time with respect to future processing;
- You can object to the processing of your personal data at any time and request that such processing be restricted;
- You are entitled to the right of data portability; and
- You have the right to file a complaint with a data protection authority.

Who is the controller of the global CRM Database?

All entities within the MarshBerry Group jointly control the CRM Database. Where they process your personal data within the global CRM Database as joint controllers, Marsh, Berry & Company, LLC is primarily responsible for informing you about your privacy rights under applicable data protection laws. You can address any requests or complaints you may have with regard to your personal data to Marsh, Berry & Company LLC. As needed, other entities within the MarshBerry Group with access to your personal data will provide Marsh, Berry & Company LLC all necessary cooperation, assistance and information in order to comply with your privacy rights under the GDPR or similar regulations.

CONTACT US

If you have any additional questions or concerns about this CRM Data Privacy Notice or our privacy policies and practices, please the Data Protection Officer (DPO) at dataprotectionofficer@lincolnternational.com. Please visit our Privacy Policy page for more information on our data protection policies: <https://www.marshberry.com/privacy-policy/>
