

Driesassur NV Is an Insurance broker with company number **0404466739**, registered in the register of insurance intermediaries maintained by the FSMA whose registered office is Rue du Congrès 12 - 14 in 1000 Brussels – [www.fsma.be](http://www.fsma.be).

<b>CUSTOMER INFORMATION FORM</b>	
Name/Company name:	Contact Person:
Address:	
Telephone 1:	Email :
Telephone 2	
Marital status*:	Date of birth*:
ID Card/Passport N** :	Valid until*:
Company registration number:	
Do you , any of your family members or relatives with close personal or professional ties, hold political or leading public office at the regional, national or international level now or during the last 12 months?	
<input type="checkbox"/> Yes Specify the function: _____ <input type="checkbox"/> No	
You know our company through:	

\*Only applicable for private persons.

#### Accessibility of our office

We are at your disposal either during a visit to our offices or by telephone. You can also send us an email or a letter.  
Office hours: Monday-Friday : 08.30H – 17.30H by appointment.

#### Communication with our office

Our office communicates with you by electronic means whenever possible, which you said you preferred over providing information on paper. By signing this document, you agree to this method/media of communication and to the accuracy of the email address provided. You also agree to notify us of any change in your contact details, including your email address.

We hereby consider you as a professional customer, however if you would like us to classify you as a private customer, please make sure to advise us by ticking the correct box:    Professional customer    Private customer

#### Personal data protection policy

In the course of our activities, our office processes personal data. By signing this document, you authorize our office to process and transmit this data within the framework of the subscription and management of the contracts that you wish to conclude through our office. The data may also be processed by our office for commercial purposes.

If you do not wish to receive commercial information from our office, please check the box hereafter:

You will find more information on the processing of personal data by our office in our Privacy Policy below.

The processing of certain personal data requires your explicit consent:

- For consent to the processing of medical data in the context of insurance files.  
 For consent to the processing of data relating following sanction checks or to security measures in the context of insurance files.

Subject to certain conditions, you have the right to access, rectify, oppose the use of, or request the deletion, limitation or portability of your personal data. Further information on the protection of personal data can be obtained from the Data Protection Authority, Rue dela Presse 35, 1000 Brussels- [www.autoriteprotectiondonnees.be](http://www.autoriteprotectiondonnees.be) - [contact@apd-qba.be](mailto:contact@apd-qba.be).

**By signing this document, you acknowledge and agree to the General Conditions for the Provision of Insurance Mediation Services and the Personal Data Compliance Policy set out below and on our website: [www.driesassur.com](http://www.driesassur.com)**

Done in duplicate at Antwerpen, on .....A copy is given to the client.

COMPANY .....

Name + First Name.....Function:.....

Signature

## **General conditions for the provision of insurance intermediation services**

### **Our services**

The activity of our office consists in providing advice on insurance contracts, in presenting or proposing insurance contracts or in carrying out other preparatory work for their conclusion or in concluding them, or in contributing to their management and execution. For these services of insurance intermediation, we receive a remuneration based upon commission agreements with various insurers, about which you will find all the information on our website.

### **Rules of conduct**

Our offices are required to follow the MiFID and IDD regulations.

MiFID, which entered into effect in 2007, is the Markets in Financial Instruments Directive. Its successor, MiFID II, came into effect in 2018. This is a European directive setting out the rules to be followed by financial institutions when they offer you investment products or give you advice in this regard. • IDD is the Insurance Distribution Directive. This is a European directive that contains rules regarding the distribution of insurance products. The purpose of IDD is to ensure that everyone involved in selling insurance products follows the same rules.

. Information about how our office complies with these rules of conduct (including our office's conflict of interest policy) can be found on our website.

### **Information through our website**

In accordance with legal provisions, our office uses its website to communicate certain information to its clients. The use of a website to inform a customer is considered appropriate to the context in which the business is conducted if it is proven that the customer has regular access to the Internet. The provision by the client of an email address as a means of communication for the purpose of conducting business with our office constitutes proof of such regular access.

### **Correct and complete information**

The quality of our services depends on the quality of the information you provide us. That is why it is important that you provide our office with correct and complete information both before the conclusion of an insurance contract and during the course of the contract. If you provide incorrect or incomplete information, our office cannot be held responsible for the consequences. As part of our services, you will receive various documents from our office. It is your responsibility to read them carefully, while our office is at your disposal for any explanations or comments you may have. In all cases, it is your responsibility to verify that the documents submitted to you meet your requirements and needs. Please check that the documents sent are in conformity and report any anomaly.

### **Handling of complaints**

Our office aims to satisfy its clients. If you have any problems or questions, our office is at your disposal. If you have a complaint concerning our service that we have not been able to resolve by mutual agreement, you can contact the Insurance Ombudsman Service whose head office is located at Square de Meeoës 35, 1000 Brussels - Tel 0032 (0)2/547.58.71 - Fax 0032 (0)2/547.59.75 – [info@ombudsman-insurance.be](mailto:info@ombudsman-insurance.be) and [www.ombudsman-insurance.be](http://www.ombudsman-insurance.be)

### **Confidentiality of data**

Each party, our office and you as our customer, undertakes not to disclose to third parties any confidential information concerning the other party of which it has knowledge in the context of this collaboration, with the exception of information which must be communicated to third parties for the proper execution of the contract (for example insurer, reinsurer, expert, etc.) and legal exceptions.

### **Anti-money laundering and combating the financing of terrorism**

With the desire to participate in the combat against money laundering and terrorist financing and in application of the law of 11 January 1993 on the prevention of the use of the financial system for the purpose of money laundering and terrorist financing, you agree to answer the questions that our office is required to ask you in this context and to provide the required documents at first request.

### **Applicable law**

The present conditions are governed and interpreted in accordance with Belgian law.

For the most recent version of these general conditions for the provision of insurance mediation services, please refer to our website.

### **Personal Data Privacy Policy**

We are committed to maintain the privacy of the persons we meet in the course of our activities.

This Privacy Policy describes how we handle the Personal Data we collect from forms, phone calls, e-mails and other communications with you. We treat your Personal Data in accordance with all applicable data protection regulations.

By signing this Policy, using our services, registering for one of our events or otherwise providing us with your Personal Data, you acknowledge and agree to the terms of this Privacy Policy and the processing and transfer of Personal Data in accordance with this Policy.

The Personal Information that we collect in the course of our relationships mainly falls into the following categories:

- Personal information: name, address, e-mail, telephone number, gender, marital status, family information, date and place of birth, employer, job title and work experience, relationship with the insured, beneficiary or claimant, including contact details of your family's minors as insured or beneficiaries.
- Identification information: national identification number, identity card number, driving licence number.
- Financial information: bank account number, income and other financial information.
- Information about the insured risk which may contain Personal Data and may include, only to the extent appropriate to the insured risk (1) medical data (current or past medical conditions, health condition, information about injuries or disabilities, relevant personal habits, medical history), (2) criminal record data, criminal convictions, including traffic violations.
- Information about the insurance policy, the quotes individuals receive and the policies they obtain.
- Information on previous claims for compensation which may include medical data, criminal record data, and other special categories of personal data.
- Information on pending claims which may include medical data, criminal record data, and other special categories of personal data.
- Marketing data according to the lawfulness of the processing in order to receive advertising from us and third parties

We use this Personal Data for:

- Responding to your requests and communicate with you and others in the course of our activities.
- Enabling you to access the information we make available online to users of our services.
- Providing you with support and assistance in connection with our services.
- Sending you important information regarding changes to our products and services, terms and conditions and other administrative, technical or commercial information.
- Making decisions about providing services to you.
- Conducting market surveys and analyses, including satisfaction surveys.
- Providing you with marketing information (including information about our products or other products and services offered by our selected third-party partners) in accordance with your expressed preferences.
- Enabling you to actively participate in our activities, including forums, discussions, seminars, appointments and other events and manage these activities. Some of these activities are subject to additional terms and conditions that may contain additional information about how we use and disclose your Personal Information. We therefore suggest that you read them carefully.
- Resolving complaints and manage data access or correction requests.
- Complying with applicable laws and regulatory obligations (including laws outside your country of residence), such as those relating to the prevention of money laundering and terrorist financing, respect judicial procedures and respond to requests from public governmental authorities (including those outside your country of residence).

The legal basis for the treatment of data are as follows:

- the consent of the data subject who has, at any time, the right to withdraw his or her consent (without compromising the lawfulness of the processing operation based on the consent given before the withdrawal);
- the processing is necessary for the performance of a contract to which the data subject is a party or for the performance of pre-contractual measures taken at the request of the data subject;
- the processing is necessary for compliance with a legal obligation to which the controller is subject;
- the processing is necessary for the legitimate interests pursued by the controller or by a third party;
- processing is necessary for the performance of a task carried out in the public interest or in the exercise of official authority vested in the controller.

If we process Personal Data for purposes other than those set out in this Policy, we will provide you with information about the new purpose and any other necessary information before beginning the new processing.

We do not use decision-making techniques based on automated processing that produce legal effects concerning or significantly affecting the data subject.

We may make Personal Data accessible to the following persons and entities:

- External third-party service providers such as insurance companies, experts, computer system service providers, support, hosting, printing service providers and other similar third party vendors and outsourced service providers who assist us in the performance of our activities.
- Governmental authorities and third parties involved in a legal action or under a legal obligation.
- Other third parties with whom we may share Personal Information in connection with a current or proposed reorganization, merger, sale, joint venture, assignment, portfolio transfer or other transaction related to all or part of our business.

We take appropriate technical and organizational measures that are in compliance with applicable privacy and data protection laws. If you have reason to believe that your interaction with us is no longer secure (for example, if you feel that the security of your Personal Data that you may have with us may have been compromised), please notify us immediately.

When we provide Personal Data to a service provider, the service provider will be carefully selected and shall use appropriate measures to ensure the confidentiality and security of the Personal Data.

We take reasonable steps to ensure that the Personal Information processed is reliable for the intended use, and as accurate and complete as necessary to fulfil the purposes described in this Policy.

Personal Data is kept for 40 years after the end of each contract. With respect to individuals who have signed the Customer Record and this Privacy Policy but have not subscribed to products, Personal Information will be destroyed 12 months after the signing of this Policy.

If you provide us with Personal Data about other persons, you consent: (a) to inform the individual of the contents of this Privacy Policy, and (b) to obtain the legally required consent for the collection, use, disclosure, and transfer (including cross-border transfer) of Personal Data in respect of the individual in accordance with the terms of this Policy.

You have the right to access, rectify, oppose the use of, or request the deletion, limitation or portability of your Personal Data on certain bases. Please contact us at the address on the front, proving your identity by means of a copy of your identity card, with all your requests or if you have any questions or concerns regarding the way we handle your Personal Data. Please note that certain Personal Data may be exempted from rights of access, rectification, deletion, limitation, objection or portability in accordance with the Belgian GDPR or Privacy Laws.

We review the rules contained in this Policy regularly and reserve the right to make changes at any time to reflect changes in our business and legal requirements. We invite you to visit our website regularly.

If you are not satisfied with the way we handle your Personal Data and feel that contacting us will not resolve the problem, applicable privacy laws recognize your right to complain to the appropriate data protection authority (<https://www.autoriteprotectiondonnees.be>).