

# UNION

Versicherungsdienst  
GmbH

## UNION Versicherungsdienst GmbH

Customer Information at First Business Contact

### About us

UNION Versicherungsdienst GmbH is the reliable partner for the institutions and employees of the "Paritätische" in all matters relating to insurance protection. On behalf of its shareholder – the German Parity Welfare Association – UNION mediates high-quality and low-priced insurance and pension products. In the context of long-term broker-assignments and as representatives of our clients' interests, we provide insurance and risk advisory services. We also assume mediation and administration of insurance contracts. In this role, UNION Versicherungsdienst GmbH ensures that insurers fulfill their contractual and legal obligations towards our customers in a contractually correct, prompt and client-focused manner.

As a specialized insurance broker, we are authorized in accordance with Section 34d paragraph 1 of the German Trade Regulations [Gewerbeordnung]. UNION Versicherungsdienst GmbH acts exclusively in the interest of its customers. In accordance with Section 11a German Trade Regulations, UNION Versicherungsdienst GmbH is registered with the Chamber of Industry and Commerce Lippe zu Detmold and is listed as an insurance broker in the German intermediary register under No. D-SOXI-5D28Y-34. Please visit the website of the Intermediary Register at <http://www.vermittlerregister.info> or contact the Deutscher Industrie- und Handelskammertag (DIHK) e.V. [Association of German Chambers of Industry and Commerce], Breite Strasse 29 in 10178 Berlin. Phone: +49 180-600 585-0 (20 ct per call from the German landline network; calls from the German mobile phone network will not exceed 60 ct per call) for further information on the insurance brokers listed in the intermediary register. Please visit our website at [www.union-paritaet.de](http://www.union-paritaet.de) for further information about UNION Versicherungsdienst GmbH.

UNION Versicherungsdienst GmbH will normally receive a broker's commission for its activities, which is included in the insurance premium. If agreed, it works on a fee basis, which is to be paid directly by the client; a combination of broker's commission and fee is possible.

UNION Versicherungsdienst GmbH does not receive any other payments as remuneration. For insurance contracts brokered and/or managed by the Ecclesia Group Assekuranz-Service GmbH as insurance agent for insurers, this company receives a commission from the insurer for its activities on behalf of the insurer, which is included in the insurance premium.

UNION Versicherungsdienst GmbH is strongly committed to resolve any dispute arising out of or in connection with our contractual relationship amicably. We are obliged to take part in extrajudicial settlement of disputes before the Arbitration Boards of the Versicherungsombudsmann e. V., Postfach 080632, 10006 Berlin, [www.versicherungsombudsmann.de](http://www.versicherungsombudsmann.de) and of the Ombudsmann Private Kranken- und Pflegeversicherung, Kronenstraße 13, 10117 Berlin, [www.pkv-ombudsmann.de](http://www.pkv-ombudsmann.de), where these arbitration bodies are competent.

As an annex to this customer information at first business contact with our company, please find the data protection declaration of UNION Versicherungsdienst GmbH and the information in accordance with art. 13 and 14 GDPR attached.

UNION Versicherungsdienst GmbH is an organization of the Ecclesia Group, which has its headquarters in Detmold. With about 1,750 employees and a turnover of 235 million euros, the Ecclesia Group is the largest German insurance broker for companies and institutions ([www.ecclesia-group.com](http://www.ecclesia-group.com)). The Ecclesia Group operates its own companies in Austria, Switzerland, Italy, Belgium, the Netherlands and Turkey. With its partners in the Ecclesia Global Network it has a worldwide presence.

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# Data Privacy Statement and Information in accordance with Articles 13 and 14 of the GDPR

## General

We attach great importance to your privacy and strictly adhere to data protection regulations when processing data.

Please also forward this information to the current and future authorised representatives and possible co-insured persons.

## Name and contact details of the responsible party

UNION Versicherungsdienst GmbH  
Ecclesiastrasse 1 – 4  
32758 Detmold  
Telephone +49 5231 603-0  
Telefax +49 5231 603-197  
Email [info@union-paritaet.de](mailto:info@union-paritaet.de)

## Contact details of the data protection officer

UNION Versicherungsdienst GmbH  
Data protection officer  
Ecclesiastrasse 1 – 4  
32758 Detmold  
Telephone +49 5231 603-6129  
Telefax +49 5231 603-606129  
Email [dsb@union-paritaet.de](mailto:dsb@union-paritaet.de)

## Purposes for the processing of personal data, as well as the legal basis for the processing

We only process your data for the purpose of fulfilling our brokering services. In particular, this includes the provision of insurance services and the associated coverage inquiries, contract conclusions, contract management and the processing of damage claims. The legal basis for the processing of data is art. 6 para. 1 lit. b of the GDPR.

If we have not collected your personal data directly from you (for example, in conjunction with the processing of damage claims), then the legal basis for the data processing shall result from art. 6 para. 1 lit. f of the GDPR, or from the legitimate interests of us or of third parties. Legitimate interest is in regard to efficiently supporting our customer in conjunction with a damage case and all associated matters relating to insurance law. Without the processing of this data, damage cases cannot be settled, or can only be done so with difficulty.

In the event of special categories of personal data being processed, this shall exclusively take place with your explicit consent. The legal basis for this processing results from art. 9 para. 2 lit. a of the GDPR.

## Categories of personal data that are processed

Personal data is all information which relates to an identified or identifiable natural person.

Various categories of personal data are processed for the fulfilment of our brokering services. Examples of these include name, address, bank details, communication data, insurance contract numbers, etc.

Special categories of personal data shall only be processed with your consent. Among other things, this involves health-related data.

## Recipients of your personal data

Your personal data shall only be passed on to third parties with your consent or if there is a legal justification for consent. In addition, our employees are obligated to confidentiality and compliance with the provisions of data protection legislation.

Transmission of your personal data to state institutions and authorities who are entitled to receive such information shall only take place within the framework of the relevant legislation, or if we are obligated to do so due to an official or judicial decision.

Particularly within the framework of coverage inquiries, contract conclusions, contract management and the processing of benefit and damage cases, it may be necessary to transmit your data to other locations or receive data from these locations. This involves:

- Insurance companies
- Reinsurance companies
- Insurance intermediaries
- Technical service providers
- Social insurance agencies
- Financial services institutions
- Lawyers
- Expert witnesses

For the technical processing of brokering services, we have commissioned Ecclesia Holding GmbH to process your personal data on our behalf within the framework of an order processing contract.

## Your security

We take technical and organisational measures to protect your data against unauthorised access, loss, manipulation and destruction. Our

security measures are constantly being updated in accordance with technological development.

### **Storage duration**

Your personal data is stored for the fulfilment of our brokering services and the associated legal obligations. Provided that your personal data is no longer necessary for this purpose, it will be automatically deleted.

Our brokering services and their associated legal obligations include, in particular, the retention of documents and information within the framework of the statutory retention periods (up to ten years), as well as evidence of proper guidance and contractual performance (according to the statutory limitation periods up to 30 years).

### **Rights of the persons affected**

You have a right to access information about your stored personal data at any time. According to articles 16 to 20 of the GDPR, you also have the right to the correction of inaccurate data, the right to the deletion of your personal data, the right to restrict the processing of your personal data, as well as the right to data portability.

### **Right to revoke consent**

You have the right to revoke your given consent at any time. This revocation shall apply with immediate future effect. The lawfulness of any processing carried out until the moment of revocation on the basis of consent shall not be affected by the revocation.

### **Right to complain**

If you are of the opinion that the processing of your personal data constitutes a violation of the GDPR, then you have the right to lodge a complaint with a supervisory authority.

### **Provision of your personal data**

Without processing your personal data, it is not possible for us to fulfil our brokering services. This is why it is necessary to disclose your personal data.

In specific cases, for example in the event of damages, this may involve voluntary information. Where this is the case, we shall make you aware accordingly. The personal data provided by you is processed solely for the purposes communicated.

### **Sources from which your personal data originates**

If we have not collected your personal data directly from you, this data originates from the following sources:

- Communication with our customers
- Insurance companies
- Reinsurance companies
- Insurance intermediaries
- Social insurance agencies
- Lawyers
- Expert witnesses

### **Questions, suggestions, complaints**

If you have additional questions about the data protection information and the processing of your personal data, you can contact us or our data protection officer directly using the contact details specified above.