

From: Name:
Adresse:

- hereinafter referred to as client -

For: Versicherungsbüro Weiss GmbH | Kirchweg 44 | 14129 Berlin
E-Mail: verwaltung@versicherungsbuero.weiss | Telefon: +49 30 -40 36 31 95

1. Overview and content of this form:

As part of your brokerage contract with [Versicherungsbüro Weiss GmbH | Kirchweg 44 | 14129 Berlin](#) you inquire about the brokerage of an insurance contract and / or a financial investment, combined with the associated consultation and / or the supervision and administration of existing contractual relationships. For this purpose, your personal data is required in the context of data recording, consultation documentation, contract application or conclusion as well as contract management (hereinafter referred to as "data").

The associated collection and use of your data is partly permitted by law, as far as it is necessary to fulfill the contract with you. For special types of personal data - such as your health data - the law requires you to grant additional data processing consent. In addition, product providers of health, life and accident insurance require a release from confidentiality for their employees, so that your health data and other protected data under § 203 StGB can be transmitted to other entities, such as broker pools or reinsurers. The provision of consent to the processing of health data and the confidentiality release are the subject of this document, which also serves as your data protection information.

As far as information is contained in this document, it serves to make the content and scope of the subsequent declaration of consent and confidentiality release transparent to you.

2. Collection, processing and usage of your data

a) Health data:

Your data will be collected, processed and used by Versicherungsbüro Weiss as part of your brokerage contract for contract-related advice and processing, and for the purpose of product providers requested by Versicherungsbüro Weiss for you (such as insurance companies, investment companies, closed-end fund initiators, banks, etc.) and stored and used by them for the application examination. If requested by you we can also collect, process and use data between you and the suppliers of existing contracts.

Your additional data protection consent regarding your health data:

Regarding my health insurance data provided by me to Versicherungsbüro Weiss, I give my consent that Versicherungsbüro Weiss and the contacted health care providers may collect, process (in particular also store and transmit) as well as use my data as far as it is necessary for the consultation, mediation and examination of my application or my preliminary inquiry as well as for the supervision of existing contracts. If I have already commissioned Versicherungsbüro Weiss with existing contracts, my consent extends to those existing contracts.

b) Transfer of tasks to third parties regarding risk assessment

An insurer does not perform certain tasks itself, such as risk assessment, benefits processing or telephone customer care (which may lead to the collection, processing or use of your health data) but may transfer the execution thereof to another company of the insurance group to which the insurer belongs or to another entity. If in such cases your protected data under § 203 StGB is passed on, an insurer requires your confidentiality release for itself and if necessary, for the other entities. Insurers maintain an up-to-date list of entities and categories of entities that are contractually collecting, processing or using health data for the particular insurer, stating the tasks assigned. An up-to-date list can be viewed on the Internet on the website of the particular insurer or can be requested from it. Insurers need your consent for the distribution and usage of your health data regarding the entities listed.

Your additional data protection consent regarding risk assessment:

I consent to the fact that the inquired insurer can transmit my health data to the above-mentioned entities and that my health data may be collected, processed and used by those entities to the same extent as the insurer itself is able to do so. If necessary, I release the employees of the insurance group to which the particular insurer belongs too as well as third party entities from their confidentiality and consent to the transmission of my health data and other data protected under §203 StGB.

c) Data transmission to reinsurers

In order to secure the fulfillment of your claims, the requested insurer can engage in reinsurance, which will take over all or parts of the risk. In some cases, the reinsurers use reinsurance themselves for which they also might transfer data. In order for reinsurers to be able to form its own opinion about the risk, it is possible for the insurer to submit your insurance application or pre-inquiry to reinsurance. This is particularly the case if the insured sum is particularly high or if it is a difficult risk. In addition, it is possible that reinsurers support the insurer with regard to its special expertise in risk assessment as well as in the evaluation of procedures. If a reinsurer decides to hedge the risk, they can check whether the insurer has correctly assessed the risk. In addition, data on your existing contracts and claims may be passed on to reinsurers to the extent necessary to enable them to verify if and to what extent they can participate in the risk. To settle premium payments, data about your existing contracts may be passed on to reinsurers. For the purposes mentioned above, the most anonymous or pseudonymous data, but also personal health information is used. Your personal data may be used by reinsurance only for the above-mentioned purposes. You will be informed by the insurer about the transmission of your health data to reinsurance companies.

Your additional data protection consent regarding risk assessment:

I consent to the fact that my health data, if required, may be sent to reinsurers and may be used there for the above-mentioned purposes. If necessary, I release the employees from the insurer and reinsurer from their confidentiality regarding my health and other data protected under § 203 StGB.

d) Storage and usage of your health data if the contract does not materialise

If the contract between you and an insurer does not materialize, the insurer may save your health data collected as part of the risk assessment in the event that you apply for insurance cover again. The insurer may also save your data in order to be able to answer possible inquiries from other insurers. Your data will be stored with the insurer until the end of the third calendar year after the year of your application.

Your additional data protection consent regarding data from not materialised contracts:

I consent to the insurer storing and using my health data – if the contract does not materialize – for a period of three years from the end of the calendar year of the application for the above-mentioned purposes.

e) Involvement of broker pools

In order to be able to offer you as many possibilities as possible regarding comparison and plans of as many providers as possible, we engage with so-called broker pools.

Broker pools assist affiliated brokers in initiating contracts, in particular obtaining comparable rates and offers, but also in the event of any justification and execution of contracts between clients (i.e. you) and product providers (such as insurance companies, investment companies, initiators of closed-end funds, banks, etc.) as well as in the communication with the product providers. In the case of the involvement of a broker pool, the broker pool – like the Versicherungsbüro Weiss itself – receives data on the respective preliminary request, the respective application and any subsequent contract and on the implementation of the contract related personal data of you including any health data, such as in the case of health insurance or disability insurance contracts.

The mediation of a contract and its subsequent support or the care of existing contracts by Versicherungsbüro Weiss also takes place with the support of broker pools. Should we change the broker pool, it would be necessary to transfer the supervised contracts including the associated data, including health data, to the new broker pool.

Versicherungsbüro Weiss is working with the following broker pools: [Aruna](#) | [FondsFinanz](#) | [VEMA](#)

Your additional data protection consent regarding broker pools:

I consent to Versicherungsbüro Weiss using and working with the above-mentioned broker pools in order to mediate and support contracts instructed by me and in such a case, that Versicherungsbüro Weiss may transmit my personal data, including my health data. If necessary, the broker pool may use the transmitted data for communication with the respective product providers. Additionally, I consent to my data being transferred to a new broker pool if Versicherungsbüro Weiss engages with a new broker pool.

f) Flow of information from the product provider to Versicherungsbüro Weiss and involved broker pools

Should a contractual relationship between a product provider and you commence (due to the mediation of Versicherungsbüro Weiss) and / or Versicherungsbüro Weiss takes care of an existing contract, Versicherungsbüro Weiss and the involved broker pools may be required to obtain data from you, including data that allows conclusions about your health (e.g. the content of the contract, acceptance with risk premium, exclusion of certain risks, etc.) for the purpose of looking after the respective contract by the product provider. This may include protected data according to § 203 StGB. In order to justify the contractual relationship, a corresponding return information can also be provided before the contract is concluded.

Your additional data protection consent regarding the information flow:

I consent to Versicherungsbüro Weiss and the involved broker pools obtaining, storing and using data, including related health data and data protected under § 203 StGB, from product providers I have a contractual relationship with for the purpose of taking care of my instructed contracts. Additionally, I release the inquired insurers and their employees from their confidentiality regarding required health data. My consent extends to existing contracts that I have charged Versicherungsbüro Weiss with taking care of.

g) Contact regarding annual check-ups as well as informational purposes

Versicherungsbüro Weiss is legally obliged to inform you regularly about your existing contracts and to check them for topicality and correctness respectively to check whether the contracts meet the current state of the art and your current needs. On a general basis an annual review is carried out within the framework of the statutory requirements and we will contact you to this end.

In addition, information mails on current topics are sent during the year, which will not, however, contain any advertising for specific products. Much more, we require this information in order to provide you as our client with a comprehensive and up-to-date overview of any cover that may be necessary and thus to comply with our obligation to review your status quo.

Your additional data protection consent regarding annual check-ups as well as informational purposes:

I consent that the Versicherungsbüro Weiss may contact me regarding the annual inventory review / check-up and for information purposes during the year. In particular, consent to the inventory review is necessary so that the Versicherungsbüro Weiss can show me to the extent required by law regarding my current coverage and any possible coverage gaps.

h) Data transfer in case of the sale of Versicherungsbüro Weiss

In the case of the sale of Versicherungsbüro Weiss to a successor and in order for your contract to be maintained without interruption by the successor, the successor requires access to your data, including any health data you have provided. Before such a transfer, Versicherungsbüro Weiss will separately and explicitly inform you about a sale and about the legal successor. You then have the opportunity to object to the transfer.

Your additional data protection consent regarding a potential sale:

I consent to Versicherungsbüro Weiss passing on my data communicated to it to a successor in the event of a sale of the company. The successor may use the data for the purposes of taking care of my contracts, insofar that I have not objected to a transfer to the successor.

Granting your consent is voluntary. You can revoke your consent / confidentiality release at any time, as well as delete individual of the above consent passages. However, if the existence of consent is a prerequisite for Versicherungsbüro Weiss to fulfill the mandate you have given, it may result in a restriction of the brokerage services or even termination of the brokerage contract.

With the following signature, you explicitly grant your consent, as described in detail above.

City, Date

Signature