

Chubb Privacy

Appendix 2 Legal Basis for Processing



| Activity | Type of information collected | The basis on which we use the information | Who we may disclose the information to |
|---|-------------------------------|---|--|
| Prospective Insured and Insured Persons | | | |
| |) Contact Details |) Performance of a contract | |
| Set up a record on our systems |) Personal Risk Information |) Legitimate interests (to ensure we have an accurate record of all Insured Persons we cover) |) Service Providers |
| |) Policy Information | | |
| Carry out background, sanction, fraud and credit checks |) Contact Details |) Conditional consent |) Service Providers |
| |) Personal Risk Information |) Legitimate interests (to ensure that Insured Persons are within our acceptable risk profile and to assist with the prevention of crime and fraud) |) Credit reference agencies |
| |) <u>Criminal Data</u> | |) Anti-fraud databases |
| | |) <u>Legal obligation</u> | |

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|---|-------------------------------|--|---|
| Manage renewals |) Contact Details |) Performance of a contract |) Third Party Administrators) Service Providers |
| |) Policy Information |) Legitimate Interests (to determine whether to extend cover for a renewal period, and if so, on what terms) | |
| |) Personal Risk Information |) Consent | |
| |) <u>Health Data</u> |) <u>Local law exemptions</u> | |
| |) <u>Criminal Data</u> | | |
| Provide client care, assistance and support |) Contact Details |) Performance of a contract |) Assistance Providers |
| |) Policy Information |) Conditional consent |) Service Providers |
| Receive premiums and payments |) Contact Details |) Performance of a contract |) Banks |
| |) Financial Information | | |
| Marketing |) Contact Details |) Legitimate interests (to provide Insured Persons with information about insurance products or services which may be of interest) |) Service Providers |
| |) Marketing |) Consent | |
| | | | |

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| Comply with legal and regulatory obligations |) Contact Details |) Legal obligation |) Regulators (e.g. FCA, PRA, DPA) |
| |) Policy Information | |) Law enforcement bodies |
| |) Personal Risk Information | |) Courts |
| |) Financial Information | |) Other Insurers (under court order) |



Claimant

| | | | |
|-------------------------------|---|---|------------------------------|
| Receive notification of claim |) Policy Information) Claim Details |) Performance of a contract |) Third Party Administrators |
| | |) Legitimate interests (<i>third party claimants</i>) (to maintain an accurate record of all claims received and the identity of claimants) |) Assistance providers |
| | | |) Service providers |

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|---|---|--|---|
| Assess claim | <ul style="list-style-type: none">) Claim Details) <u>Health Data</u>) <u>Criminal Data</u> |) Performance of a contract | <ul style="list-style-type: none">) Third Party Administrators) Loss Adjusters) Solicitors) Claims Experts |
| | |) Legitimate interests (to assess the circumstances of a claim) | |
| | |) <u>Consent</u> | |
| | |) <u>Local law exemptions</u> | |
| | |) <u>Establish, exercise or defend legal claims</u> | |
| Monitor and detect fraud | <ul style="list-style-type: none">) Claim Details) <u>Anti-fraud Data</u> |) Performance of a contract | <ul style="list-style-type: none">) Surveillance providers (<i>exceptionally</i>)) Anti-fraud databases) Law enforcement bodies |
| | |) Legitimate interests (to monitor, assess and ultimately prevent fraud) | |
| | |) <u>Consent</u> | |
| | |) <u>Local law exemptions</u> | |
|) <u>Establish, exercise or defend legal claims</u> | | | |

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| Settle claim |) Financial Information |) Performance of a contract |) Banks) Solicitors |
| | |) Legitimate interests (<i>third party claimants</i>) (to settle claims to successful third party claimants) | |
| Comply with legal and regulatory obligations |) Policy Information |) Legal obligation |) Regulators (e.g. FCA, PRA, DPA) |
| |) Claim Details | |) Law enforcement bodies |
| |) Anti-fraud Data | |) Courts |
| |) Financial Information | |) Other Insurers (under court order) |
| Business Partners and Visitors | | | |
| Manage relationships |) Contact Details |) Legitimate interests (to maintain an accurate client and partner relationship management platform) |) Service Providers |
| | |) Consent | |
| Administer contracts |) Contact Details |) Performance of a contract | |

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| Activity | Type of information collected | The basis on which we use the information | Who we may disclose the information to |
|---|--|--|--|
| Marketing |) Contact Details |) Legitimate interests (to communicate to Business Partners about events, services or products which may be of interest to their sector) |) Service Providers |
| |) Marketing | | |
| | |) Consent | |
| Run events and host office visitors; accommodate website visitors |) Website or Office Visitor |) Legitimate interests (to organise and host events which may be of interest to Business Partners) |) Service Providers |
| | |) Consent | |
| Applicable to all | | | |
| Transfer books of business |) All (<i>where relevant to the book</i>) |) Legitimate interests (to structure our business appropriately) |) Courts |
| | |) Legal obligation (<i>under a Part VII transfer</i>) |) Purchaser |
| | |) <u>Consent</u> |) Professional advisors |
| Sale or reorganisation of a Chubb company |) All |) Legitimate interests (to structure our business appropriately) |) Courts |
| | |) Legal obligation |) Purchaser |
| | |) <u>Consent</u> |) Professional advisors |

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