



Kasey Osman Insurance Agency, LLC

California Privacy Notice (CCPA/CPRA)

Version 1.0 • Effective February 09, 2026

Document Control

Document: California Privacy Notice (Standalone)

Current Version: 1.0

Effective Date: February 09, 2026

Status: Approved for internal/website publication once posted.

Audit Log (Change History)

Version	Date	Category	Change Summary	Owner/Approver
1.0	February 09, 2026	Initial release	Created standalone California notice with categories collected, purposes, disclosures, consumer rights instructions, and contact methods. Applies to KOI operations across all channels.	KOI Compliance/Operations

Note: Future changes should increment the version number (e.g., 1.1, 1.2, 2.0) and add a new row above, most recent first.



Summary

This notice is for California residents and applies to KOI’s insurance agency operations across all channels (including website, webforms, calls, SMS/text, email, social media, and in-person interactions). It describes categories of personal information we collect, purposes, disclosures, and rights under the CCPA/CPRA.

Categories Collected (Examples)

Category	Examples	Collected
Identifiers	Name, address, email, phone, IP address.	Yes
Customer Records	Insurance application data, policy details, payment info.	Yes
Commercial Information	Products/services considered or purchased.	Yes
Internet/Network Activity	Site interactions, device/browser data.	Yes
Geolocation	Approximate location from IP.	Yes (limited)
Sensitive PI	SSN last four and driver’s license when required; health info only if needed for a product.	As needed

Purposes

To provide insurance services; comply with law; prevent fraud; maintain security; provide customer support; and send permitted communications.

Disclosures

We disclose personal information to insurance carriers/MGAs/wholesalers, service providers, and regulators as required. We do not sell personal information and do not share personal information for cross-context behavioral advertising.

Your Rights & How to Exercise

You may request: access/know, delete (subject to exceptions), correct, and to limit use of sensitive personal information where applicable. Submit requests to privacy@kaseyosmanins.com. We will verify your identity and respond within legal timelines. You may use an authorized agent with proper documentation. We do not discriminate for exercising your rights.

Contact

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