

## Privacy policy regarding bexio advice-only legal protection

**Handling your personal data responsibly is a core concern for Protekta. This privacy policy describes how and why we process personal data.**

In the following, «processing personal data» is understood to mean, for example, procuring, saving, storing, using, altering, disclosing, archiving, deleting or destroying personal data.

«Personal data» is, in the following, understood to mean all information referring to a certain or identifiable person (e.g. name/company, address, e-mail address, telephone number).

If you disclose personal data of other persons (e.g. employees) to Protekta, please inform the person(s) concerned of this privacy policy regarding bexio advice-only legal protection or send them this policy.

Please only disclose personal data of third parties if this is permitted and the information provided is correct.

While for reasons of readability only the masculine form is used in the text, the information nevertheless refers to members of all genders.

### 1. Scope of this privacy policy

This privacy policy applies to all processing of personal data in the course of the activities specified below. The legal entity responsible for such data processing in accordance with data protection law is **Protekta Legal Protection Insurance Ltd.**, Monbijoustrasse 5, 3011 Berne.

It is also referred to in this privacy policy as «Protekta», «we» or «US».

Protekta is a Mobilière Group company.

Please note that a specific privacy policy applies to use of the website. This can be found at [www.protekta.ch/datenschutz](http://www.protekta.ch/datenschutz).

### 2. Contact

Please refer to the following address if you have any questions regarding data protection:

Protekta Legal Protection Insurance Ltd.  
Reference: Data protection  
Monbijoustrasse 5  
3011 Berne  
E-mail: [datenschutz@protekta.ch](mailto:datenschutz@protekta.ch)

You are entitled to contact the data protection advisors of Mobilière Group, Bundesgasse 35, 3001 Berne. However, you will help us to handle your request more efficiently if you use the Protekta contact details.

### 3. Provision of data

The provision of certain personal data is essential for fulfilment of the contractual services and obligations of Protekta. Should you not be prepared to provide us with personal data, we may not be able to provide the contractually agreed services. You will find your rights specified in section 9.

### 4. Categories of personal data

The following categories of personal data that you have disclosed to us may be processed in particular:

- Customer data such as name, address, e-mail address, telephone number, details of a legal case or legal issue;
- Data concerning other third parties involved in a legal case such as name, address, e-mail address, telephone number.

### 5. Purposes of processing

Protekta processes your personal data if this is necessary for fulfilment of the bexio advice-only legal protection insurance policy. Your personal data are processed in compliance with the applicable legal requirements only for purposes explicitly stated to you or obvious under the circumstances.

Your personal data may in particular be processed for the following purposes:

- Provision of an advisory service (legal advice) within the scope of the bexio advice-only legal protection insurance policy
- Review of insurance protection
- Optimisation and new development of products and processes
- Evaluation of data and maintenance of statistics
- Exchange of data with service providers
- Safeguarding of compliance with statutory, regulatory and internal regulations
- Internal training and security purposes (e.g. recording of telephone conversations)
- Maintenance of the organisation of business operations
- Invoicing and settlement
- Fending-off of claims against Protekta

In order to ensure a flawless level of service (e.g. for internal training) and for quality and evidential purposes, legal advice calls may be recorded and/or simultaneously monitored by line managers for supervisory purposes.

Such recordings are normally deleted automatically after 14 days at the latest. Your telephone number, last name and first name are anonymised in the event of any further use of the recordings (e.g. for internal training).

## 6. Data recipients

A recipient is understood to mean any person to whom personal data are transmitted or made accessible. The recipients are service providers who process data on behalf of Protekta for bexio advice-only legal protection.

### Service providers

Service providers (e.g. for IT solutions) may under certain circumstances process personal data on behalf of Protekta. They are contractually obliged to observe currently valid data protection law and to keep all information confidential. They may process the data only for the contractually specified purposes and not for purposes of their own.

Personal data are only transmitted to recipients abroad if these recipients are subject to adequate data protection legislation. If data are transmitted to a service provider in a country without adequate data protection legislation, adequate data protection is ensured by means of contractual guarantees or, in exceptional cases, on the basis of your personal consent. For this purpose, we, as a rule, use the standard contractual clauses issued or recognised by the European Commission and the Federal Data Protection and Information Commissioner (FDPIC) (further information and a copy of these clauses can be found at [www.edoeb.admin.ch/edoeb/en/home/datenschutz/arbeit\\_wirtschaft/datuebermittlung\\_ausland.html](http://www.edoeb.admin.ch/edoeb/en/home/datenschutz/arbeit_wirtschaft/datuebermittlung_ausland.html)), provided the recipient is not already subject to a legally recognised body of laws and regulations to ensure data protection and there is no exemption clause we can draw on. Exceptions may in particular include legal proceedings abroad, cases of overriding public interest, cases in which the processing of a contract requires such disclosure of personal data, cases in which you have personally consented to such disclosure or if you have made the data in question publicly accessible and not objected to their processing. Protekta may draw on the services of service providers in both European and other countries. Personal data may consequently be processed worldwide. Please contact us if you would like to have a copy of the standard contractual clauses.

## 7. Duration of storage

Protekta processes your personal data for as long as this is necessary for the fulfilment of the purposes specified above. After that, your personal data are, as a rule, deleted or anonymised. Your personal data may, however, continue to be processed due to legal storage obligations or for the period in which claims against Protekta can be filed. The duration of data storage is largely governed by statutory periods of limitation and the period in which claims against Protekta can be filed.

## 8. Data security

Protekta takes appropriate technical and organisational measures to protect your personal data against manipulation, loss, destruction or access by unauthorised persons. These

measures are guided by international standards and are accordingly re-examined and, if necessary, adjusted on a regular basis.

## 9. Rights of the data subjects

If your personal data are processed by Protekta, you may, in accordance with applicable data protection law, assert the following rights at any time and, as a rule, free of charge:

### 9.1 Right to information

You have the right to receive information on your personal data processed by Protekta. You can submit your request for information in writing, enclosing a copy of your ID card or passport, to the address stated under section 2.

### 9.2 Right to correction

Protekta endeavours to ensure that your data are kept correct and up to date. Should we nevertheless have stored incorrect personal data about you, we will be happy to correct them at your request.

### 9.3 Right of objection

You have the right to object to the processing of your personal data that is not essential for fulfilment of the contract, that we are not legally obliged to carry out or that is carried out without any overriding interest on the part of Protekta, with immediate effect for the future.

### 9.4 Right of deletion or limitation

You have the right of deletion of your personal data or limitation of their processing if such processing is not essential for fulfilment of the contract, not required by law (e.g. statutory retention obligations) or if the data are processed without any justified interest on the part of Protekta.

### 9.5 Right of data transfer

In certain cases you have the right to have your personal data registered in a common electronic format or to have them transmitted and/or disclosed to a different person or entity (e.g. another insurance company).

### 9.6 Further rights

You may contact the data protection authority responsible if you believe your data protection rights may have been violated.

The data protection authority responsible in Switzerland is:

Federal Data Protection and Information Commissioner  
Feldeggweg 1  
3003 Berne, Switzerland

## 10. Reservation regarding changes

This privacy policy may be adjusted to any new legal requirements and to the specific data processing concerned. The most recent version can be found on the bexio website.

Most recently updated on 1 October 2023.