



## CCPA Verifiable Consumer Request Form

This request applies solely to personal information of California residents (defined by the CCPA as consumers) collected by United Heritage Financial Group and United Heritage Life Insurance Company (collectively "United Heritage") to the extent the personal information is subject to the CCPA.

Only the consumer or someone legally authorized to act on the consumer's behalf may make a verifiable consumer request related to the consumer's personal information. A consumer may designate an authorized agent by using our Authorized Agent Affidavit form or by providing us with a copy of an appropriate power of attorney. A parent or guardian may also make a verifiable consumer request on behalf of a minor child (a consumer who is less than 13 years of age).

After we receive your form, we will contact you if we need to collect additional information from you in order to properly verify the request. Only once we have verified the identity of the consumer and the authority of the requestor to make the request will we process your request.

Please complete this form in its entirety as failure to do so may slow our response or prevent disclosure. If you have any questions or need assistance, please call us at 1-800-657-6351 ext. 4000 or email us at [heritage@unitedheritage.com](mailto:heritage@unitedheritage.com).

For paper forms, mail to: United Heritage, RE: CCPA Verifiable Consumer Request, PO Box 7777, Meridian, ID 83680

### **I. Request Type**

I am making the following type of request of United Heritage (indicate all that apply):

- Request to Know Categories of Information - I request disclosure of the categories of personal information collected by United Heritage on the consumer.
- Request to Know Specific Pieces of Information - I request disclosure of the specific pieces of personal information maintained by United Heritage on the consumer.
- Request to Delete Information - I request deletion of the consumer's personal information maintained by United Heritage and its service providers, as required by law.

### **II. Requestor's Information**

1. What is the requestor's relationship to the consumer (choose one):

- I am submitting this request regarding my own personal information.
- I am a parent or guardian of the consumer who is less than 13 years of age and am submitting this request regarding the minor child's information.
- I am an authorized agent submitting this request on behalf of another consumer with power of attorney or the consumer's signed permission to do so. (A consumer may designate an authorized agent by using our Authorized Agent Affidavit form.)

2. Requestor's first and last name: \_\_\_\_\_

3. Requestor's phone number (for questions we may have regarding your request): \_\_\_\_\_

4. Preferred method for responding to your request (choose one):

E-mail address: \_\_\_\_\_

US mail address: \_\_\_\_\_  
Street Address/PO Box City, State, Zip

**III. Consumer's Information**

1. Is the consumer a resident of California?  Yes  No

2. Consumer's full legal name: \_\_\_\_\_  
First Middle Last

Suffix (if applicable):  Jr.  Sr.  II  III

Prior names (if applicable): \_\_\_\_\_

3. Consumer's address: \_\_\_\_\_  
Street Address/PO Box City, State, Zip

4. Consumer's e-mail address: \_\_\_\_\_

5. Consumer's phone number: \_\_\_\_\_

6. What is the consumer's relationship with United Heritage (indicate all that apply):

- Existing client with active policy(ies)
- Former client with cancelled policy(ies)
- Beneficiary of a former or existing client
- Claimant
- Payor of a policy or account

For any of the above, please provide associated policy numbers: \_\_\_\_\_

- Prospect who received a quote or solicitation from United Heritage
- Other – (please explain) \_\_\_\_\_

**IV. Declaration of Identity and Perjury Statement**

By signing this document, I certify that all of the information submitted on this request form is true and correct as of this date to the best of my knowledge and belief. I understand that I may make a verifiable consumer request to know twice within a twelve-month period. Additionally, I understand the information submitted on the request form will only be used by United Heritage for the limited purpose of processing and recording my verifiable consumer request, and for security and fraud-prevention purposes. I represent that I am at least 13 years old.

By signing this document, I hereby declare under penalty of perjury, pursuant to the laws of the United States of America and any applicable state laws, that I am the person making this request and that I am the person (or parent, guardian, or authorized agent of the person) whose personal information is the subject of the request. I understand that falsifying any information could subject me to civil and criminal penalties.

Requestor's Signature \_\_\_\_\_

Requestor's Printed Name \_\_\_\_\_

Date \_\_\_\_\_