TACTIVE™

PRIVACY POLICY

Investment advisors are required by law to inform their clients of their policies regarding privacy of client information. We are bound by professional standards of confidentiality that are even more stringent than those required by law.

Federal law gives the customer the right to limit some but not all sharing of personal information. It also requires us to tell you how we collect, share, and protect your personal information.

TYPES OF NONPUBLIC PERSONAL INFORMATION (NPI) WE COLLECT

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. Additionally, we collect personal data you provide when using our AI-powered services. This can include but is not limited to your Social Security Number, Date of Birth, Banking Information, Financial Account Numbers and/or Balances, Sources of Income, and Credit Card Numbers or Information. When you are no longer our customer, we may continue to share your information only as described in this notice. Some data may be used to improve our AI Models, you can opt out of having your content used for training purposes.

AI-SPECIFIC DATA USE AND RETENTION

We may share personal data with our proprietary AI Model and service providers to deliver AI and other operational functionality. Any sharing is disclosed, and users are informed of their rights to opt in or out of such data processing. We retain AI-related data only as long as necessary for operational purposes or model development. Your inputs may be processed to generate AI responses, provide recommendations, or personalize your experience. Our AI Platform is closed ecosystem and only uses reliable AI resources. Your data will remain within the Tactive AI Platform and not be accessible to the world wide web.

PARTIES TO WHOM WE DISCLOSE INFORMATION

All Investment Advisors may need to share personal information to run their everyday business. In the section below, we list the reasons that we may share your personal information:

- For everyday business purposes – such as to process your transactions, maintain your Account (s), respond to court orders and legal investigations, or report to credit bureaus;
- For our marketing – to offer our products and services to you;
- For joint marketing with other financial companies;

- For our affiliates' everyday business purposes – information about your transactions and experiences and information about your creditworthiness; or
- For affiliates and non-affiliates to market to you.

If you are a new customer, we may begin sharing your information on the day you sign our Agreement. When you are no longer our customer, we may continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.

PROTECTING THE CONFIDENTIALITY OF CURRENT AND FORMER CLIENT'S INFORMATION

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards and secured files and buildings.

FEDERAL LAW GIVES YOU THE RIGHT TO LIMIT SHARING – OPTING OUT

Federal law allows you the right to limit the sharing of your NPI by "opting-out" of the following: sharing for affiliates' everyday business purposes – information about your creditworthiness or sharing with affiliates or non-affiliates who use your information to market to you. State laws and individual companies may give you additional rights to limit sharing. Please notify us immediately if you choose to opt out of these types of sharing.

DEFINITIONS

Affiliates – companies related by common ownership or control. They can be financial and non-financial companies; Non-affiliates – Companies not related by common ownership or control. They can be financial and non-financial companies; Joint marketing – a formal agreement between non-affiliated financial companies that together market financial products or services to you.

AI – Artificial Intelligence

Closed-Ecosystem- is designed to automatically achieve and maintain a desired output by comparing the actual output with a reference input and correcting any differences through feedback.

Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

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