



# Privacy Policy for Agile Wealth LLC

Agile Wealth LLC (“Agile Wealth”) is committed to protecting your privacy and developing technology that gives you the most powerful and safe online experience. This Statement of Privacy applies to Agile Wealth’s cloud-based compliance software (Software) and governs data collection and usage. By using the Software, you consent to the data practices described in this statement.

## **COLLECTION OF YOUR PERSONAL INFORMATION**

Agile Wealth collects personally identifiable information, such as your e-mail address, name, home address, work address, telephone number, fax number. Agile Wealth also collects anonymous demographic information, which is not unique to you, such as your zip code, age, gender, preferences, interests and favorites.

In order to process payment for products or services for the Software, Agile Wealth uses a secure 3<sup>rd</sup>-party billing service to collect your credit card information and keep track of your payment history for the various products and services you purchased from Agile Wealth.

There is also information about your computer hardware and software that is automatically collected by Agile Wealth. This information can include: your IP address, browser type, domain names, pages visited, access times and referring web site addresses. This information is used by Agile Wealth for the operation of the service, to maintain quality of the service, and to provide general statistics regarding use of the Software.

Agile Wealth encourages you to review the privacy statements of web sites you choose to link to from Agile Wealth so that you can understand how those web sites collect, use and share your information. Agile Wealth is not responsible for the privacy statements



or other content on web sites outside of the Agile Wealth and Agile Wealth family of web sites.

## **USE OF YOUR PERSONAL INFORMATION**

Agile Wealth collects and uses your personal information to operate the Software and deliver the services you have requested. Agile Wealth also uses your personally identifiable information to inform you of other products or services available from Agile Wealth and its affiliates. Agile Wealth may also contact you via surveys to conduct research about your opinion of current services or of potential new services that may be offered.

Agile Wealth will not sell, rent or lease its customer lists to third parties. Agile Wealth may, from time to time, contact you on behalf of external business partners about a particular offering that may be of interest to you. In addition, Agile Wealth may share data with trusted partners to help it perform statistical analysis, send you email or postal mail, provide customer support, or arrange for deliveries. All such third parties are prohibited from using your personal information except to provide these services to Agile Wealth, and they are required to maintain the confidentiality of your information.

Agile Wealth keeps track of the web sites and pages our customers visit within the Software and from our website, in order to determine what Agile Wealth services are the most popular. This data is used to deliver customized content and advertising within Agile Wealth to customers whose behavior indicates that they are interested in a particular subject area.

Softwares will disclose your personal information, without notice, only if required to do so by law or in the good faith belief that such action is necessary to: (a) conform to the edicts of the law or comply with legal process served on Agile Wealth or the site; (b) protect and defend the



rights or property of Agile Wealth; or, (c) act under exigent circumstances to protect the personal safety of users of Agile Wealth, or the public.

## **USE OF COOKIES**

The Software uses “cookies” to help you personalize your online experience. A cookie is a text file that is placed on your hard disk by a web page server. Cookies cannot be used to run programs or deliver viruses to your computer. Cookies are uniquely assigned to you, and can only be read by a web server in the domain that issued the cookie to you.

One of the primary purposes of cookies is to provide a convenience feature to save you time. The purpose of a cookie is to tell the web server that you have returned to a specific page. For example, if you personalize Agile Wealth’s pages, or register with Agile Wealth’s web site or services, a cookie helps Agile Wealth to recall your specific information on subsequent visits. This simplifies the process of recording your personal information, such as billing addresses, shipping addresses, and so on. When you return to the same Software, the information you previously provided can be retrieved, so you can easily use the Agile Wealth features that you customized.

You have the ability to accept or decline cookies. Most web browsers automatically accept cookies, but you can usually modify your browser setting to decline cookies if you prefer. If you choose to decline cookies, you may not be able to fully experience the interactive features of the Agile Wealth services or web sites you visit.

## **SECURITY OF YOUR PERSONAL INFORMATION**

Agile Wealth secures your personal information from unauthorized access, use or disclosure. Agile Wealth secures the personally



identifiable information you provide on computer servers in a controlled, secure environment, protected from unauthorized access, use or disclosure. All data transmission is protected through the use of encryption, such as the Secure Socket Layer (SSL) protocol.

## **CONTACT INFORMATION**

Agile Wealth welcomes your comments regarding this Privacy Statement. If you believe that Agile Wealth has not adhered to this Statement, please email Agile Wealth at *officesupport@agilewealth.com*. We will use commercially reasonable efforts to promptly determine and remedy the problem.

## **OTHER LEGAL NOTICES**

Any dispute over privacy is subject to this Privacy Statement and the Terms of Use, found on this web site, including limitations on damages and application of the law of the State of Colorado. Agile Wealth will occasionally update this Privacy Statement to reflect company and customer feedback. Please note that the use of information that Agile Wealth gathers is subject to the privacy notice in effect at the time of use. You should check the Software frequently to see recent changes.