



Votaire, LLC, Privacy Policy

Introduction

Votaire, LLC (“Votaire”) understands that many visitors to our website and users of our mobile application are concerned about the information they provide and how we treat that information. This Privacy Policy contains important information with respect to personally identifiable and/or financial information collected through the Votaire.com website (the “Website”) and Votaire mobile app (the “App”). You should read it before using our Website or App (the “Services”). If you choose to use our Services, you are telling us you have read and agree to the terms of this Privacy Policy and consent to our actions that are consistent with this Privacy Policy.

Visitor Data Automatically Collected on the Website

If you choose to visit the Website without using its available tools where you may input your personally identifiable and/or financial information, we will collect the following information about you: the name of the search engine from which you access the Internet (for example, Google.com), the date and time you access our Website, and the pages you have visited on the site. We collect this information to help the Website work correctly, evaluate the use of the Website, and determine user interest. We may also use single session “cookies” on this site. A “cookie” is a small piece of information sent by a web server to a web browser to be read back from that browser. Cookies are a way to have the browser “remember” specific bits of information so that you can get around the site easier and more efficiently. Single session cookies expire at the end of your session and will not record your personally identifiable and/or financial information.

Collection of Information You Submit Through Our Services

We collect personally identifiable information and other information that you provide to us. If you choose to use our Services, you may be asked to submit personally identifiable and/or financial information. For example, you may be asked to share information concerning your retirement income goals, amount of savings, income information, and other information about your spouse/partner. In addition to the information already collected about you listed in the previous paragraph, we will collect any information that you submit to us through our Services.

Collection of Information via Third-Party Data Providers

In addition to the data listed above, we may receive and collect personally identifiable or financial information from other third-party data providers (e.g., payroll provider, 401(k)/403(b) recordkeeper, or your employer). This data is provided with the full consent and knowledge of the third-party data provider.

Collection of Information via Third-Party Aggregation Tool

We have partnered with Morningstar ByAllAccounts (the “Aggregation Provider”), a third-party aggregation partner. This allows you to link your financial accounts, if you so choose. Once you have linked your account, your account balances will be updated on a daily basis so that guidance is dynamic to market events and spending behavior.

The Aggregation Provider will maintain your account information and your account access information but will not sell, exchange, or release your information to a third party. A full copy of the Aggregation Provider’s security and privacy policy may be found at <http://www.byallaccounts.net/manuals/Accountview/ByAllAccountsSecurityPrivacyPolicy.pdf>.¹

Links to Other Sites

Our Services may contain links to other websites that are not under the control of Votaire. A link to another website is for the convenience of our visitors and does not mean that Votaire endorses or accepts any responsibility for the content, accuracy, or use of that linked website. For your protection, we urge you not to share personal information you input on our Services with others. You should also know that e-mail is not necessarily secure against interception.

Legal Process/Disclosures to Law Enforcement

We may disclose your information in other special circumstances, including when the sharing is necessary to protect Votaire, our customers, our employees, or any other person, or where otherwise required by law. Votaire may provide your information in response to a search warrant, subpoena, or other legally valid inquiry or order, or to an investigative body in the case of a breach of an agreement or contravention of law, or as otherwise required by applicable law.

Business Transfers

Votaire may transfer any information we have about you in connection with a sale of assets, a merger, or any other type of sale (including transfers made as part of insolvency or bankruptcy proceedings) involving all or part of Votaire or as part of a corporate reorganization or stock sale or other change in corporate control.

Do Not Track

As technologies to address Do Not Track signals are still evolving, we do not currently deploy any technology to respond to Do Not Track signals or other mechanisms that provide consumers the ability to exercise choice regarding the collection of personally identifiable information about an individual consumer’s online activities.

¹ Note that this is an external link and may become unstable.

Data Sharing

Votaire may from time to time present products or services offered by third parties on its Services. In such scenarios, demographic, financial, or contact information may be shared with the third party to show a more appropriate product or service. If a link to a third party product or service provider is followed, Votaire may provide additional information to the third party to allow for an easier and more seamless experience outside of the Votaire Services.

Security

Votaire is concerned with the security of your personal information. Accordingly, Votaire takes care to implement physical, technical, and administrative safeguards that it believes are reasonable to protect the security of your personal information on our system, both internally and from outsiders. Unfortunately, no data transmission over the Internet, nor any data Votaire collects or stores, can be guaranteed one hundred percent secure. As a result, while Votaire strives to protect your personal information, it cannot guarantee the security of any information you transmit to Votaire.

Changes to Privacy Policy

Votaire reserves the right to change this Privacy Policy at any time and without notice. You should review the Policy regularly to stay updated on any changes.

Questions/Contact Information

If you have questions about this privacy notice please contact:

Privacy Officer

Votaire

8415 Allison Pointe Boulevard, Suite 300

Indianapolis, IN 46250

contact@votaire.com

317-845-3527