



DataDriven Advisor, LLC Privacy Policy MoneyPacer, LLC Privacy Policy

Policy Effective Date: July 1, 2022

Privacy Policy

All references to DataDriven Advisor also refer to MoneyPacer (MP). MP recognizes that you entrust us with both your hard-earned assets (via the one-time payment for our services) and your personal and financial information. We consider this information to be private and confidential. Ensuring your privacy is our utmost concern. This document describes how we treat personal information when you use MP's products and services.

Information We Collect

MP uses your personal information to provide you with the superior service you expect from us. MP may collect public and nonpublic personal information about you from any of the following sources:

Information from forms you provide to us in connection with your accounts (such as your name, state of residence, birth date, assets, liabilities and income);

Information about your investment accounts (such as account type and account balances);

MP restricts access to non-public personal information about Users to certain MP employees who require that information in order to provide our services. MP may ask you for additional personal information, such as your name, in order to provide personalized services to you. MP stores, processes, and maintains data related to you in order to provide our services.

Along with cookies, MP may also use third-party tracking technology, such as Google Analytics, to record similar information regarding you and your activity on the Site.

MP is not directed to anyone under the age of 18. If a parent or guardian becomes aware that his or her child under the age of 18 has provided us with personally identifiable information without his or her consent, he or she should contact us at support@moneypacer.com. If we become aware that a child under the age of 18 has provided us with personally identifiable information, we will delete such information from our files.

Use of Information

MP has always considered the protection of sensitive information to be a foundation of customer trust and an important business practice. We do not sell your personal information to anyone. We do not disclose or share nonpublic personal information about you to third parties, unless one of the following limited exceptions applies or you have specifically asked us to do so:

We disclose personal information to technology companies that help us process or service your transactions or account(s) (such as Amazon Web Services). We may disclose or report personal information in limited circumstances where we believe in good faith that disclosure is required or permitted under law, for example, to cooperate with regulators or law enforcement authorities.

MP restricts access to your personal and account information to those employees who need to know that information in order to provide services to you. We maintain physical, electronic, and procedural safeguards to guard your nonpublic personal information.

MP may send you information related to MP services or your account if you are a current or former Client. If you decide at any time that you no longer wish to receive marketing communications from us, please inform us of your desire to “unsubscribe” by contacting us at support@moneypacer.com.

Information Sharing and Onward Transfer

We do not sell, rent, or otherwise share your personal information with any third parties except as permitted or required by law. We disclose personal information to technology companies that help us process or service your account(s).

MP maintains physical, electronic and procedural safeguards that comply with federal standards to guard Users’ non-public personal information.

Special Rules for the Use and Sharing of Information of Clients

If you wish to become a Client, we will ask you for certain information, including, but not limited to, your full legal name, contact information, state of residence, birth date, citizenship, approximate net worth, and other regulatory disclosures that may be necessary. We require such information in order to be able to provide our services to Clients in accordance with the rules of regulatory bodies such as the Securities and Exchange Commission and FINRA. You may choose not to provide such information to us, but you will not be able to become a Client.

Your Choices

You may request deletion of personal information by emailing support@moneypacer.com and providing us enough information to identify your account and prove that you are the owner of the identified account. We will endeavor to act on these deletion requests as soon as reasonably practicable. Deletions take effect when we act on them. Residual information related to your account may remain for some time on our servers. If you are a Client you may request that we remove your personal information, and we will do so as soon as reasonably practicable. However, we may retain such information, as well as any data related to your account, in accordance with applicable laws. In no case will we share any individual data unless required by regulators or other government bodies.

You may decline to provide personal information to MP. Declining to provide personal information may disqualify you for MP services and Site features that require certain personal information.

Online analytics

We may use third-party web analytics services on our Services, such as those of Google Analytics. These service providers use the sort of technology described in above to help us analyze how users use the Services, including by noting the third-party website from which you arrive. The information (including your IP address) collected by the technology will be disclosed to or collected directly by these service providers, who use the information to evaluate your use of the Services. We also use Google Analytics for certain purposes related to advertising, as described in the following section.

Phishing Scams

MP does not send emails to customers requesting billing, login or password information. If you receive an email purporting to be from MP that asks you to provide personal or account information, or login and passwords, do not provide such information unless you have first verified that the website or email is from MP. Such emails may be fraudulent and used in connection with scams known as phishing. MP asks that you report any suspicious emails or websites to MP.

Changes to this Policy

This Privacy Policy may change from time to time. We will not reduce your rights under this Privacy Policy without your explicit consent. We will post any Privacy Policy changes on this page and, if the changes are substantial, we will provide a more prominent notice (including, for certain services, email notification of Privacy Policy changes).

More Information

This document constitutes MP's complete Privacy Policy for MP and the Site.

If you have questions or comments about this Privacy Policy, please email us at support@moneypacer.com.