



Kingsview Partners Privacy Policy and Customer Notice

Last Updated: December 3, 2025

We recognize the importance of protecting the privacy of your personal data. We have implemented policies and security measures to protect the information you provide us. This Privacy Policy (this “Policy”) describes the ways in which Kingsview Partners, LLC (“Kingsview”. “we,” “us” or, “our” in this privacy policy) collect, process, and disclose personal information about you, including personally identifiable information, in connection with your interaction with us, our website (the “Site”) or offline, or otherwise contact us, such as via phone, email, or mail.

Financial companies choose how they share your personal information. Law gives consumers the right to limit some but not all sharing. These laws also require us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do. All financial companies need to share customers’ personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers’ personal information, the reasons Kingsview may choose to share; and whether you can limit this sharing.

This Policy also describes any rights you may have regarding information about you and the way to contact us to exercise those rights. It also describes the extent to which we may disclose that information to affiliates and non-affiliated third parties. Pursuant to the EU’s General Data Protection Regulation (“GDPR”), this Privacy Policy and Customer Notice (“Privacy Notice”) outlines the way in which Kingsview collects, discloses, uses, stores and protects the Personal Data it collects regarding Data Subjects.¹

This Policy, and the policies described herein, are subject to change at any time. If we make changes to this Policy, we will update the date it was last changed. You will receive this Policy at the start of your customer relationship with Kingsview, and annually thereafter should there are any changes that have occurred since the last notice you received. This Policy is available on the Kingsview website at www.kingsview.com/privacy to access at any time. We encourage you to check for updates to the Privacy Policy on an ongoing basis.

Data Controller Contact Details

Kingsview is the data controller in relation to your personal data. Our contact details for all data privacy inquiries and questions are provided at the end of this Policy.

Collection of Information

Depending on your relationship with us, we collect and process the following kinds of personal data:

- Personal identifiers and contact information, such as your name, postal address, e-mail address, telephone number, or other similar information that is defined as personal data or personally identifiable information under an applicable law (“personal data”);
- Login credentials, such as username and password;
- Account information and preferences, such as email preferences and paperless registration;
- Bank account information, such as account number and routing number;
- Payment card information, including card number and expiration date;

¹ Personal Data includes any information relating to an identifiable person, and includes, for example, names, location data, addresses, identification numbers, job titles, contact numbers, birth date, tax residence information, payment details, and more.

- Social security number, account balance, assets and transaction or loss history, and investment experience.
- Demographic information, such as date of birth;
- Social media handles, content and other data posted on our official social media pages, and information we obtain from third-party social media services (e.g., Facebook) if you choose to link to, create or log into the Site through these services;
- Documents or other content you upload to the our website and/or through our chat or email interfaces, such as letter, notices, and supporting material for dispute-related matters and other concerns or questions you have relating to your account(s) with Kingsview; and
- Other personal information you submit to us, such as through chat, email, or other communications, or sign-up forms;
- About your Internet connection, the equipment you use to access our Site, and usage details; and

We collect this information:

- Directly from you when you provide it to us;
- Automatically as you navigate through the website. Information collected automatically includes all or some of the following; usage details, IP addresses, and information collected through cookies, web beacons, and other tracking technologies. Please see our Cookie Policy (<https://www.kingsview.com/cookie-preferences>) for more information about our use of cookies.
- From our affiliates or non-affiliated partners such as our marketing and advertising partners or service providers, including credit bureaus, affiliates, or other companies.

Retention of Information

Kingsview reserves the right to retain and use personal data for as long as necessary to comply with our legal and regulatory obligations and business requirements and/or to resolve any ongoing disputes and enforce our agreements. Personal data that falls outside of the defined records of the firm will be retained only for as long as the information is needed to fulfill the purposes for which it is collected and processed or where you withdraw your consent (where applicable). For the avoidance of doubt, data will not be destroyed before any regulatory retention period expires, or during a pending investigation, whether legal or regulatory.

To support us in managing how long we hold personal data and our record management, we maintain a data retention policy which includes clear guidelines on retention and deletion.

We consider the following criteria when determining how long a particular record will be retained, including any personal data contained in that record:

- How long the record is needed to provide you with the products and services you request
- How long the record is needed to support and enhance our operational processes
- How long the record is needed to protect our rights and legal interests
- How long the record must be retained to comply with applicable laws and regulations

It is likely the same personal data about you will be included in more than one record and used for more than one purpose, each of which is subject to retention periods that can differ based on the factors listed above.

Disclosure of Information to Third Parties

Financial companies typically need to share customers' personal information to run their everyday business. Federal law gives consumers the right to limit some but not all sharing of personal information.

Depending on your jurisdiction, State laws and individual companies give you additional right to limit sharing. See below for more on your rights under state law.

We will disclose personal data to third parties under one or more of the following circumstances:

- To fulfil the purpose for which you provide the information
- To contractors, service providers, and other third parties we use to support our business and who are bound by contractual obligations to keep personal data confidential and use it only for the purposes for which we disclose it to them.
- To a buyer or other successor in the event of a merger, divestiture, restructuring, reorganization, dissolution, or other sale or transfer of some or all of Kingsview assets, whether as a going concern or as part of bankruptcy, liquidation, or similar proceeding, in which personal data held by Kingsview about our Site users is among the assets transferred.
- For any other purpose disclosed by us when you provide the information.
- With your consent.

We also disclose your personal data:

- As required to comply with any court order, law, or legal process, including a response for a government or regulatory request.
- To enforce or apply our terms of use and other agreements, including for billing and collection purposes.
- If we believe disclosure is necessary or appropriate to protect the rights, property, or safety of our customers, or others. (This includes exchanging information with other companies and organizations for the purposes of fraud protection and credit risk reduction.)

Federal law gives you the right to limit only:

- Sharing for affiliates everyday business purposes – information about your creditworthiness
- Affiliates from using your information to market to you
- Sharing for nonaffiliates to market to you.

Reasons we can share your personal information	Does Kingsview Partners share?	Can you limit this sharing?
For our everyday business purposes — For example: to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus.	Yes	No
For our marketing purposes — to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	We don't share.
For our subsidiaries and affiliates' everyday business purposes — information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes — information about your creditworthiness	No	We don't share.
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	No	We don't share.

Questions?	▪ Call 1-888-887-1555 or email info@kingsview.com
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Protection of Information

We maintain physical, electronic, and procedural safeguards designed to protect your personal data. We use reasonable best efforts to require that any person or institution to which we disclose personal data will protect the confidentiality of that information and use the information only for the purposes for which we disclose the information to them. In addition, we restrict access to nonpublic personal data to those employees who need to know that information in the course of their job responsibilities.

Unfortunately, the transmission of information via the internet is not completely secure. Although we do our best to protect your personal data, we cannot guarantee the security of your personal data transmitted with Kingsview. Any transmission of personal data is at your own risk. Kingsview maintains a written incident management and response program and will notify affected customers of any unauthorized access to sensitive customer information in accordance with federal regulations.

Collection of Information

The personal data we collect about you includes data within the categories below. Kingsview adopts these categories as defined by California law and represent the categories of personal data that we have collected about you. Where we collect this data, the purposes for which we process it, and how we have disclosed personal data to third parties in the past 12 months are consistent with how we treat other data under this Policy as described above. We do not necessarily collect all data listed in a particular category, nor do we collect all categories of data for all individuals.

We have also disclosed data in each of the following categories with our affiliates and service providers for our business purposes within the last 12 months. We may receive requests for data from regulatory authorities, our auditors and/or our legal advisors. If requested from such parties, we would disclose your personal data as appropriate.

We do not sell your personal data or share your personal data for cross-contextual behavioural advertising, as those terms are defined under California law.

<u>Category of Personal Data</u>	<u>Source of Personal Data</u>	<u>Purpose of Collect, Processing, and Disclosure</u>
Personal identifiers such as a real name, alias, postal address, unique personal identifier, online identifier, Internet Protocol address, email address, account name, social security number, driver's license number, passport number, or other similar identifiers.	We collect information in this category: Directly from you or your devices, for example, through your use of the Site Our affiliates and subsidiaries Your employer, if you are a representative of a vendor or other business partner Other individuals, such as in connection with a business referral Vendors who provide services on our behalf Online advertising services Internet service providers Operating systems and platforms Data analytics providers Government entities	To provide you with the goods or services you requested; To communicate with you; To provide customer service and respond to requests or inquiries; To assist with marketing; To protect against fraud and maintain the integrity of your data; Performing services, including maintaining or servicing accounts, providing customer service, processing or fulfilling orders and transactions, verifying customer information, processing payments, providing analytics services, providing storage, or providing similar services; Providing advertising and marketing services to you, except for cross-context behavioral advertising;

		Auditing related to counting ad impressions to unique visitors, verifying positioning and quality of ad impressions, and auditing compliance; Short-term, transient use, including, but not limited to, non-personalized advertising shown as part of your current interaction with us; Debugging to identify and repair errors that impair existing intended functionality; Undertaking internal research for technological development and demonstration; and Managing our relationships with current or prospective partners, business clients and vendors and other business partner personnel.
Information About You. Information that identifies, relates to, describes, or is capable of being associated with, a particular individual, including, but not limited to, your name, signature, Social Security number, physical characteristics or description, address, telephone number, passport number, driver's license or state identification card number, insurance policy number, education, employment, employment history, bank account number, credit card number, debit card number, or any other financial information, medical information, or health insurance information.	We collect information in this category: Directly from you or your devices, for example, through your use of the Site Our affiliates and subsidiaries Your employer, if you are a representative of a vendor or other business partner Other individuals, such as in connection with a business referral Vendors who provide services on our behalf Online advertising services Internet service providers Operating systems and platforms Data analytics providers Government entities	To provide you with the goods or services you requested; To communicate with you; To provide customer service and respond to requests or inquiries; To assist with marketing; To protect against fraud and maintain the integrity of your data; Performing services, including maintaining or servicing accounts, providing customer service, processing or fulfilling orders and transactions, verifying customer information, processing payments, providing analytics services, providing storage, or providing similar services; Providing advertising and marketing services to you, except for cross-context behavioral advertising; Auditing related to counting ad impressions to unique visitors, verifying positioning and quality of ad impressions, and auditing compliance; Short-term, transient use, including, but not limited to, non-personalized advertising shown as part of your current interaction with us; Debugging to identify and repair errors that impair existing intended functionality; Undertaking internal research for technological development and demonstration; and Managing our relationships with current or prospective partners, business clients

		and vendors and other business partner personnel.
Internet or other electronic network activity information: browsing history, search history, and information regarding a consumer's interaction with an Internet Web site, application, or advertisement.	We collect information in this category: Directly from you or your devices, for example, through your use of the Site Our affiliates and subsidiaries Vendors who provide services on our behalf Online advertising services Internet service providers Operating systems and platforms Data analytics providers Government entities	To protect against fraud; and To assist with marketing
Professional or employment-related information: such as your job title and entity affiliation.	We collect information in this category: Directly from you or your devices, for example, through your use of the Site Our affiliates and subsidiaries Your employer, if you are a representative of a vendor or other business partner Other individuals, such as in connection with a business referral Vendors who provide services on our behalf Internet service providers Government entities	To provide you with the goods or services you requested; Performing services, including maintaining or servicing accounts, providing customer service, processing or fulfilling orders and transactions, verifying customer information, processing payments, providing analytics services, providing storage, or providing similar services; Providing advertising and marketing services to you, except for cross-context behavioral advertising; Managing our relationships with current or prospective partners, business clients and vendors and other business partner personnel.
Information from Cookies	We collect information in this category: Directly from you or your devices, for example, through your use of the Site	To provide you with the goods or services you requested; To provide customer service and respond to requests or inquiries; To assist with marketing; To protect against fraud and maintain the integrity of your data; Performing services, including maintaining or servicing accounts, providing customer service, processing or fulfilling orders and transactions, verifying customer information, processing payments, providing analytics services, providing storage, or providing similar services; Providing advertising and marketing services to you, except for cross-context behavioral advertising; Auditing related to counting ad impressions to unique visitors, verifying positioning and quality of ad impressions, and auditing compliance;

		Short-term, transient use, including, but not limited to, non-personalized advertising shown as part of your current interaction with us; Debugging to identify and repair errors that impair existing intended functionality; Undertaking internal research for technological development and demonstration; and Managing our relationships with current or prospective partners, business clients and vendors and other business partner personnel.
Audio, electronic, visual, thermal, olfactory, or similar information	We collect information in this category: Directly from you when you call us During participation on web conferencing with your consent	To provide you with the goods or services you requested; To communicate with you; To provide customer service and respond to requests or inquiries; To assist with marketing; To protect against fraud and maintain the integrity of your data; Performing services, including maintaining or servicing accounts, providing customer service, processing or fulfilling orders and transactions, verifying customer information, processing payments, providing analytics services, providing storage, or providing similar services; Providing advertising and marketing services to you, except for cross-context behavioral advertising; Auditing related to counting ad impressions to unique visitors, verifying positioning and quality of ad impressions, and auditing compliance; Short-term, transient use, including, but not limited to, non-personalized advertising shown as part of your current interaction with us; Debugging to identify and repair errors that impair existing intended functionality; Undertaking internal research for technological development and demonstration; and Managing our relationships with current or prospective partners, business clients and vendors and other business partner personnel.
Education records: records about your education obtained from an educational institution, such as your school	We collect information in this category:	To provide you with the goods or services you requested;

transcripts and academic credentials and achievements.	Directly from you or your devices, for example, through your use of the Site Our affiliates and subsidiaries Your employer, if you are a representative of a vendor or other business partner Other individuals, such as in connection with a business referral Vendors who provide services on our behalf Internet service providers Government entities	To communicate with you; To provide customer service and respond to requests or inquiries; To assist with marketing; and To protect against fraud.
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In addition to the categories of personal information above, we also collect the following categories of sensitive personal information:

<u>Category of Personal Data</u>	<u>Source of Personal Data</u>	<u>Purpose of Collection, Processing, and Disclosure</u>
Personal identifiers such as a social security number, driver's license number, passport number, or other similar identifiers.	We collect information in this category: Directly from you or your devices, for example, through your use of the Site	To provide you with the goods or services you requested; To communicate with you; To provide customer service and respond to requests or inquiries; To assist with marketing; and To protect against fraud.
Financial account, debit card, or credit card number and information	We collect information in this category: Directly from you or your devices, for example, through your use of the Site	To process your payments
Racial or ethnic origin, religious or philosophical beliefs, or union membership.	We collect information in this category: Directly from you or your devices, for example, through your use of the Site Our affiliates and subsidiaries Your employer, if you are a representative of a vendor or other business partner Other individuals, such as in connection with a business referral Vendors who provide services on our behalf Internet service providers Government entities	To communicate with you; To provide you with the goods or services you requested; Performing services, including maintaining or servicing accounts, providing customer service, processing or fulfilling orders and transactions, verifying customer information, processing payments, providing analytics services, providing storage, or providing similar services;
Mail, email, and text messages unless the business is the intended recipient of the communication.	We collect information in this category: Directly from you or your devices, for example, through your use of the Site Our affiliates and subsidiaries	To communicate with you; To provide you with the goods or services you requested;

	Your employer, if you are a representative of a vendor or other business partner Other individuals, such as in connection with a business referral Vendors who provide services on our behalf Internet service providers Government entities	
Genetic data	We collect information in this category: Directly from you or your devices, for example, through your use of the Site Other individuals or third parties, such as in connection with a doctor's review Vendors who provide services on our behalf	To communicate with you; To provide you with the goods or services you requested;
Personal information collected and analysed concerning a consumer's health.	We collect information in this category: Directly from you or your devices, for example, through your use of the Site Other individuals or third parties, such as in connection with a doctor's review Vendors who provide services on our behalf	To communicate with you; To provide you with the goods or services you requested;

When you make a payment to Kingsview, we use a service provider, Quickbooks, to process your payment and for related business services. As part of providing these services, Quickbooks processes your payment information on our behalf as well as identifying information about the devices that connect to its services. You can learn more about Quickbooks and read its privacy policy at <https://www.intuit.com/privacy/>.

Data Subject Rights

Depending on your state of residency, particularly in California, you may be entitled to the following rights with respect to personal information about you:

- **Right to access/know.** You have the right to know and request information about the categories and specific pieces of personal information we have collected about you within the last 12 months, as well as the categories of sources from which such information is collected, the purpose for collecting such information, and the categories of third parties, or specific third parties, depending on your jurisdiction, with whom we share such information. You also have the right to know if we have sold or disclosed your personal information.
- **Right to correct.** You have the right to request correction of any inaccurate information we hold about you. We will not be able to accommodate your request if we believe it would violate any law, any legal requirements, or cause the information to be incorrect. Information solely retained for data backup purposes is generally excluded.
- **Right to delete.** You have the right to request the deletion of your personal information, subject to certain exceptions.

- **Right to limit use and disclosure of sensitive personal information.** Depending on your jurisdiction, to the extent we process or disclose your sensitive personal information, you have the right to limit our use of this information.
- **Right to opt-in to processing of sensitive personal information.** Depending on your jurisdiction, to the extent we process your sensitive personal information, or the personal information of a known child, we have to obtain your consent, or the consent of the child's parent or lawful guardian, before processing it.
- **Right to opt-out of the sale or sharing of personal information or profiling/automated decision making.** Depending on your jurisdiction, to the extent we share personal information with for purposes of targeted advertising or cross contextual behavior advertising, you have the right to opt-out. Depending on your jurisdiction, to the extent we engage in profiling or automated decision making, you have the right to opt-out by contacting 1-800-877-1555 or going to <https://www.kingsview.com/contact-us>.
- **Right to portable data.** You have the right to obtain personal information about you in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the information to another entity without hindrance.
- **Right to non-discrimination.** You have the right to not be discriminated against for exercising any of the above-listed rights.
- **Right to know and question profiling decision.** Depending on your jurisdiction, and whether your personal data is profiled in furtherance of decisions that produce legal or similarly significant effects concerning you, you have the right to question the result of said profiling, the right to be informed of the reason that the profiling resulted in the decision, and, if feasible, the right to be informed of what actions you might have taken to secure a different decision and that you might take to secure a different decision in the future. You also have the right to review the personal data used in the profiling decision.
- **Right to correct data and reevaluate decision related to profiling decision.** Depending on your jurisdiction, if a profiling decision was based upon inaccurate personal information, taking into account the nature of the personal data and purpose of processing, you have the right to have the data corrected and the profiling decision reevaluated based upon the corrected data.

We do not discriminate against you if you choose to exercise these rights.

Data solely retained for data backup purposes is principally excluded from these rights until it is restored to an active system or next accessed or used for a sale, disclosure, or commercial purpose. These rights also do not apply to pseudonymous data if the information necessary to identify the individual is kept separately and is subject to controls that prevent access to the information. Pseudonymous data is personal data that can no longer be attributed to a specific individual without the use of additional information, if the additional information is kept separately and is subject measures to ensure that personal data is not attributed to the specific individual.

Further, California law permits California residents to request – from a business with whom the California resident has an established business relationship – certain information about the types of personal information the business has shared with third parties for those third parties' direct marketing purposes, and the names and addresses of the third parties with whom the business has shared such information during the immediately preceding calendar year.

Exercising Your Rights

If you would like to exercise any of the privacy rights outlined above, please call us at 1-800-877-1555 or go to <https://www.kingsview.com/contact-us>.

You also may designate an authorized agent to make a request on your behalf. If you are submitting a request through an authorized agent, the authorized agent must provide us with your signed written permission stating that the agent is authorized to make the request on your behalf. Alternatively, your authorized agent may provide evidence of having power of attorney or acting as a conservator for you.

For your protection we may also request that any authorized agents verify their identity and may reach out to you directly to confirm that you have provided the agent with your permission to submit the request on your behalf.

When you exercise these rights and submit a request to us, we will verify your identity by asking you for the following pieces of information: your relationship with us, first and last name, email address, telephone number, postal address, or account information.

We cannot respond to your request or provide you with personal information if we cannot verify your identity or authority to make the request and confirm the personal information relates to you. Making a verifiable consumer request does not require you to create an account with us. We will use the personal information you provide to us when submitting a consumer request only to verify the requestor's identity or authority to make the request.

Depending on your jurisdiction, we have between 45 and 90 days to respond to your request.

There are certain circumstances where we will not be able to honor your request, in which case, we will notify you. For example, if you request deletion and we are required to retain certain personal information to comply with our legal obligations or other permitted purposes. Depending on your jurisdiction, you have the right to appeal this decision or to contact your Attorney General if you have concerns about the results of the appeal.

Please note that depending on your jurisdiction, we are only obligated to respond, free of cost, to personal information requests from the same consumer up to two times in a 12-month period. Depending on your jurisdiction, after you have exceeded the applicable number of requests, we have the right to charge a reasonable fee for fulfilling the request. In addition, under applicable state privacy law, and for the protection of your personal information, we will be limited in what personal information we can disclose.

Depending on your jurisdiction, we maintain your rights requests for at least 2 years. This information will not be used for any other purpose except to review compliance processes; it will not be shared except as necessary to comply with a legal obligation.

Cookies

Please visit <https://www.kingsview.com/cookie-preferences> for a description of the cookies we use and how you can accept or reject them. You can always manage your cookie preferences as discussed in <https://www.kingsview.com/cookie-preferences>.

We collect information about how you use our website by using cookies. A cookie is a small text file, generated by a website that is stored in the website user's internet browser or computer or mobile device hard drive, on a temporary or permanent basis. Cookies allow a website to identify a user's device whenever that user returns to the website. This provides the user with a more stable and enriching experience and allows a website owner to gather usage information. You can find more detailed information about cookies and how they work at www.aboutcookies.org/.

You can configure your internet browser preferences to limit the acceptance and storage of cookies, but blocking all cookies may limit your browsing experience on our and other websites.

The cookies we use vary. Some of the cookies we use are necessary to allow users to navigate our website. We also use functional cookies to gather information about user choices such as language, region, or other settings. Information gleaned from these functional cookies is usually anonymized and not used for non-functional purposes.

We use analytical services to determine the effectiveness of our content, what interests our users, and the functionality of our services. We also use web beacons, tracking pixels, and similar technologies to understand more about website visitors and count visitor numbers.

We utilize performance cookies to track how many individual users visit our website and how often they do so.

While the Kingsview website does not generally utilize targeting cookies, which deliver targeted advertising, third-party websites on which Kingsview advertises independently may use such cookies to track the success of those advertising campaigns. We will use web beacons to decipher which users arrived at our website after viewing an advertisement on such a third-party website. Web beacons may also work in concert with cookies on your device to monitor activity. You cannot block web beacons, and because they are not installed on your device, you cannot remove them.

Do Not Track Signals

We recognize your use of a universal opt-out mechanism for the purpose of targeted advertising or sale of your personal data. If there is a conflict between the opt-out request received via a universal opt-out mechanism and your existing privacy setting or voluntary participation in our Find An Advisor system, we will comply with your opt-out preference and notify you of the conflict. The notification will provide you with the option to confirm either the privacy setting or participation in the program.

Children

Our website is not intended for use by children. We do not knowingly collect personal information from anyone under the age of 16, without verifiable parental consent. If we become aware that we have inadvertently collected personal information from a child under the age of 16, we will delete such information from our records. If a parent, guardian, or anyone else becomes aware that we have collected personal information from an individual under the age of 16, please contact us.

Third-Party Links

Our website may include links to third-party websites plug-ins, and applications. By clicking on those links or enabling those connections you indicate the understanding that you will be directed away from the Kingsview Website. We do not control third-party websites and are not responsible for their privacy statements. Third-party websites often allow additional parties to collect or share data about you. If you submit personal information to any third-party websites or service providers, your information is governed by their privacy policies. We encourage you to read the privacy policy on every website you visit.

Scope / Kingsview Entities and Affiliates

This privacy policy applies to and covers all Kingsview entities that are related by common ownership or control. Our affiliates include Kingsview Wealth Management, Kingsview Trust & Insurance, Kingsview Strategic Tax Consulting and Kingsview Aviation.

Other Important information

NOTICE OF INFORMATION PRACTICES

For residents of Arizona, California, Connecticut, Georgia, Illinois, Maine, Massachusetts, Minnesota, Montana, New Jersey, Nevada, North Carolina, Ohio, Oregon, and Virginia. These states require insurers and agents to describe their information practices in addition to providing a Privacy Notice. The two notices are very similar, but in general our information practices include the following: Kingsview Partners may obtain information about you and any other persons applying for insurance. Some of this information will come from you and some may come from other sources. That information and any other

information collected by Kingsview Partners may in some circumstances be disclosed to third parties, such as agents, affiliates, service providers and others without your specific consent. In some cases, we may need your direct authorization before sharing that information. Residents have the right to access, to correct and, in some states, to delete (if incorrect) the information collected about them, except information that relates to a claim or to a civil or criminal proceeding. If you submit a request to exercise these rights you have the right to a response within 30 days. We may refuse your request where we believe the information is correct, required to fulfill a legal obligation, necessary to protect our legal interests, or as otherwise required or permitted by law. If we refuse your request, you have the right to file a statement regarding what you believe to be accurate and fair information and why you disagree with our refusal. If you are refused coverage or if your application is postponed, you may also have the right to receive the specific reason in writing. To exercise your rights or if you wish to have a more detailed explanation of our information practices required by your state, please submit a written request to the following address Kingsview Partners, 509 SE 7th St, Floor 2, Grants Pass, OR 97527 or call 1-800-877-1555. You may view our full Notice of Information Practices at <https://www.kingsview.com/privacy-policy>.

STATE-SPECIFIC DISCLOSURES

Customer personal information will be collected, used, and stored as required by applicable federal privacy laws. If the Customer's state laws provide more protection of the Customer's personal information than federal privacy laws, Kingsview Partners will protect the Customer's personal information as required by such state law.

YOUR AUTHORIZATION REQUIRED

For residents of Arizona, California, Maine, Massachusetts, Minnesota, Montana, New Jersey, New Mexico, North Carolina, North Dakota, Ohio, Oregon, and Virginia. We will not share your personal information with non-affiliated third parties (or, in some circumstances, our affiliates) other than our agents or service providers unless you authorize us to share it or the law otherwise permits us to share it. You have the right to authorize or not authorize this sharing of personal information.

FOR VERMONT CUSTOMERS

We will not disclose information about your creditworthiness to our affiliates and will not disclose your personal information, financial information, credit report, or health information to nonaffiliated third parties to market to you, other than as permitted by Vermont law, unless you authorize us to make those disclosures. Additional information concerning our privacy practices can be found at <https://www.kingsview.com/privacy-policy> or call 1-888-887-1555.

ADDITIONAL RIGHTS UNDER THE CALIFORNIA CONSUMER PRIVACY ACT (CCPA)

The California Consumer Privacy Act (CCPA) gives California residents certain privacy rights with respect to the limited non-public personal information we collect. These rights are:

- the right to notice of the personal information we collect;
- the right to know the categories, sources and specific pieces of personal information we have collected about you, including our purpose for collecting the information and the categories of third parties with whom we share that personal information, subject to certain exceptions;
- the right to correct personal information we have collected about you, subject to certain exceptions;
- the right to delete some or all of the personal information we collect, subject to certain exceptions; and
- the right to opt-out of our sale of your personal information or sharing it for cross-contextual behavioral advertising purposes, if we sell your personal information or share it for those purposes.
- the right to limit the use and disclosure of sensitive personal information we have collected about you to only those purposes necessary to provide our services.

CCPA rights are limited and do not apply to any of the personal information (described on Page 1) that we have collected from you and about you in connection with providing you an insurance or financial product or service.

The personal information we collect that is subject to the CCPA includes some of your internet and network activity your Internet Protocol address and interactions with our website) and inferences drawn about you from this information, such as your preferences, aptitudes and abilities. We may share this information with our service providers for business purposes. We do not sell personal information about current or former customers to any third parties or share it for cross-context behavioral advertising purposes. To learn how to exercise your rights under the CCPA or if you wish to see a more detailed explanation of your rights, please visit our website at <https://www.kingsview.com/privacy-policy> or call 1-800-877-1555.

DO-NOT-CALL REGISTRY

We may contact you by phone to offer additional financial products and services that may be of interest to you. You may elect to include your phone number on our internal Do-Not-Call list if you do not wish to receive telemarketing calls from us. If your telephone number is included on the Do-Not-Call list, we may still contact you for servicing purposes.

To include your phone number on our Do-Not-Call list, please call 1-800-877-1555 or go to <https://www.kingsview.com/contact-us>.

Nevada residents may also call the Nevada Attorney General for further information about these rights by contacting Bureau of Consumer Protection, Office of the Nevada Attorney General, 555 E. Washington St., Suite 3900, Las Vegas, NV 89101; Phone number: 702.486.3132; email: aginfo@ag.nv.gov.

Contact Us

If you have any questions about this privacy policy or would like to exercise your rights to opt-out of nonessential information sharing, please contact us via one of the following methods:

Email

info@kingsview.com

Toll Free Call

1-800-877-1555

Website

<https://www.kingsview.com/contact-us>