



FACTS

WHAT DOES ELLEVEST DO WITH YOUR PERSONAL INFORMATION?

Why?

Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

What?

The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security number and income
- Account balances and transaction history
- Employment information and assets

When you are *no longer* our customer, we continue to share your information as described in this notice.

How?

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 Ellevest chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Ellevest share?	Can you limit this sharing?
For our everyday business purposes— such as to process your transactions, maintain your account(s) and respond to court orders and legal investigations	Yes	No
For our marketing purposes— to offer our products and services to you	No	We do not share
For joint marketing with other financial companies	No	We do not share
For our affiliates' everyday business purposes— information about your transactions and experiences	No	We do not share
For our affiliates' everyday business purposes— information about your credit worthiness	No	We do not share
For nonaffiliates to market to you	No	We do not share

Questions?

Call 844-ELL-7100 or go to ellevest.com.

Who we are

Who is providing this notice? Ellevest, Inc. (“Ellevest”).

What we do

How does Ellevest protect my personal information? To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. Our website uses cookies, but no personally identifiable information is stored within these cookies.

How does Ellevest collect my personal information? We collect your personal information, for example, when you

- Open an account and give us your contact information or your income information
- Provide employment information or tell us about your retirement portfolio
- Seek advice about your investments

We also collect your personal information from other companies.

Why can't I limit all sharing? 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

Definitions

Affiliates Companies related by common ownership or control. They can be financial and nonfinancial companies.

Ellevest does not share with our affiliates.

Nonaffiliates Companies not related by common ownership or control. They can be financial and nonfinancial companies.

Ellevest does not share with non-affiliates so that they can market to you.

Joint marketing A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

Ellevest doesn't jointly market.