

FACTS WHAT DOES SAVVY FINANCIAL DO WITH YOUR PERSONAL INFORMATION?

Savvy Financial considers client privacy to be a fundamental aspect of our client relationships. We are committed to maintaining the confidentiality, integrity, and security of our current, prospective and former clients' 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 depends on the product or service you have with us. This information can include:

- Social security number or tax identification number
- Full legal name and date of birth
- Telephone number, address, and email address
- 529 account balance, account number, and transaction history
- Bank routing number and account number
- User-generated content

How? All financial companies need to share personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients' personal information; the reasons Savvy Financial chooses to share; and whether you can limit this sharing.

| Reasons we can share your personal information | Does Savvy Financial share? | Can you limit this sharing?? |
|---|--|------------------------------|
| For our everyday business purposes — such as 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 | Yes | No |
| For our affiliates' everyday business purposes — information about your transactions and experiences | No | We Don't Share |
| For our affiliates' everyday business purposes — information about your creditworthiness | No | We Don't Share |
| For our affiliates to market to you | No | We Don't Share |
| For nonaffiliates to market to you | No | We Don't Share |
| To limit our sharing | Email help@savvyfi.co Please note: If you are a new customer, we can begin sharing your information immediately after sending you this notice. When you are no longer our customer, we continue to share your information as described in this notice. | |
| Questions? | Email help@savvyfi.co | |

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Who we are

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| Who is providing this notice? | Savvy Financial, Inc. (SavvyFi) |
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What we do

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| How does Savvy Financial 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. |
| How does Savvy Financial collect my personal information? | We collect your personal information, for example, when you <ul style="list-style-type: none"> • Interact with SavvyFi's website, by means of cookies and similar text files to recognize you • Open an account with SavvyFi and my529 • Execute transactions with my529 or other institutions, such as banks that affect your my529 account • Give SavvyFi access to bank account details through third parties • Sign you up into the cash back program |
| Why can't I limit all sharing? | Federal law gives you the right to limit only <ul style="list-style-type: none"> • sharing for affiliates' everyday business purposes • affiliates from using your information to market to you • sharing for nonaffiliates to market to you • sharing for nonaffiliates' everyday business purposes <ul style="list-style-type: none"> - custodian account set up and cash back program State laws and individual companies may give you additional rights to limit sharing. |
| What happens when I limit sharing for an account I hold jointly with someone else? | Your choices will apply to everyone on your account |

Definitions

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| Affiliates | Companies related by common ownership or control. They can be financial and nonfinancial companies. |
| Nonaffiliates | Companies not related by common ownership or control. They can be financial and nonfinancial companies. |
| Joint marketing | A formal agreement between nonaffiliated financial companies that together market financial products or services to you. |

Other Important Information

You may expressly instruct SavvyFi to share information about you and your beneficiary with friends, family members, and other potential contributors expressly identified by you to facilitate gift contributions.