

California Notice at Collection of Personal Information

Business Contacts, Prospective Business Contacts, and Website Visitors

Ovisto™ Wealth Management LLC (also referred to as “we,” “us,” and “our”) collects California Personal Information from our business contacts (including service providers and vendors), prospective business contacts, and visitors to our website, www.ovistowealthmanagement.com. This Notice at Collection describes the categories of California Personal Information that we collect, the purpose for which the information will be used, and how long we retain the information. If you would like to learn more about our information practices, please visit our California Privacy Policy [HERE](#).

Personal Information We Collect

Categories of information we collect	Purpose for which the information will be used	How long we retain the information
Identifiers, such as your name, address, Internet Protocol (IP) address, device identifier, e-mail address, telephone number(s) and signature.	<ul style="list-style-type: none"> To market our services to you or your organization. To provide services to you and/or your organization. To receive products and services from you and/or your organization. To comply with legal requirements. 	As required by law. Typically four years after the conclusion of the business relationship.
Commercial information, such as records of products or services purchased or considered.	<ul style="list-style-type: none"> To market our services to you or your organization. To provide services to you and/or your organization. To receive products and services from you and/or your organization. To comply with legal requirements. 	As required by law. Typically four years after the conclusion of the business relationship.
Visual information, such as images from security cameras in certain secure locations in our offices.	<ul style="list-style-type: none"> To maintain security and detect fraud. 	Typically 30 days, unless circumstances require us to retain this information for a longer period.
Professional or employment-related information, including your company name and contact information, email, and possibly any relevant licenses and certifications.	<ul style="list-style-type: none"> To market our services to you or your organization. To provide services to you and/or your organization. To receive products and services from you and/or your 	As required by law. Typically four years after the conclusion of the business relationship.

Categories of information we collect	Purpose for which the information will be used	How long we retain the information
	organization. <ul style="list-style-type: none"> To comply with legal requirements. 	
Inferences drawn from any of the information that we collect about you and your business or organization.	<ul style="list-style-type: none"> To market our services to you or your organization. To provide services to you and/or your organization. 	No longer than the information on which the inferences are based.
Sensitive personal information, such as your social security number.	<ul style="list-style-type: none"> To pay you for products or services that we receive from you. To comply with legal requirements. 	As required by law. Typically four years after the conclusion of the business relationship.
Information regarding your electronic network activity on our website, www.ovistowealthmanagement.com , such as IP address, internet browsing history, usage and e-mail content.	<ul style="list-style-type: none"> To analyze traffic on our website, to maintain security, to provide for a better user experience, and to gather information to serve personalized advertisements through cross-context behavioral advertising. To market our services to you or your organization. 	Typically two months but possibly as long as 14 months.

Information We Sell or Share

If you visit our public website www.ovistowealthmanagement.com, we share your IP address, the URL you came from, and your interaction with the website with our analytics providers, third-party advertising networks, and social media platforms for their use in cross-context behavioral advertising across multiple websites. Except for this limited sharing, we do not sell or share any of your personal information with third parties.

California residents have the right to opt-out of the selling or sharing of personal information. You can opt-out by sending us an opt-out preference signal through the privacy controls available on your web browser. If you opt-out, you will still see ads but they will not be personalized based on your online activity. Our Notice of Right to Opt-Out of Sale or Sharing is available [here](#).