

California Notice at Collection of Personal Information

Clients of Ovisto™ Wealth Management LLC – Individuals Who Reside In California

Ovisto™ Wealth Management LLC (also referred to as “we,” “us,” and “our”) collects California Personal Information from our individual clients who reside in California. 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, available [here](#) or at <https://ovistowealthmanagement.com/privacy-policy/>.

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 provide services to you. • To market our services to you. • To provide you with requested information. • To comply with legal requirements. 	Seven years from the due date of the tax return or the completion date of the return, advisory services or audit, whichever is later.
Sensitive personal information, such as your Social Security Number.	<ul style="list-style-type: none"> • To provide services to you. 	Seven years from the due date of the tax return or the completion date of the return, advisory services or audit, whichever is later.
Medical information, such as bills or receipts for medical expenses.	<ul style="list-style-type: none"> • To provide services to you. 	Seven years from the due date of the tax return or the completion date of the return, advisory services or audit, whichever is later.
Commercial information, such as records of products or services purchased or considered.	<ul style="list-style-type: none"> • To provide services to you. • To market our services to you. • To comply with legal requirements. 	Seven years from the due date of the tax return or the completion date of the return, advisory services or audit, whichever is later.
Commercial information, such as your bank account number.	<ul style="list-style-type: none"> • To provide services to you. 	Seven years from the due date of the tax return or the completion date of the return, advisory services or audit, whichever is later.

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Visual information, such as your photograph taken at our marketing events and golf outings.	<ul style="list-style-type: none"> To market our services. 	We retain marketing event photos for an unlimited period of time.
Professional or employment-related information, including your profession, company name and contact information, email.	<ul style="list-style-type: none"> To provide services to you. To market our services to you. To comply with legal requirements. 	Seven years from the due date of the tax return or the completion date of the return, advisory services or audit, whichever is later.
Inferences drawn from any of the information that we collect about you.	<ul style="list-style-type: none"> To provide services to you. To market our services to you. 	No longer than the information on which the inferences are based.
Information regarding your electronic network activity using our equipment, such as IP address, internet browsing history, usage and e-mail content.	<ul style="list-style-type: none"> To analyze website activity and to improve our website. To market our services to you. To track your online activity and improve ad targeting. To maintain the security of our systems and detect fraud. 	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](#).