

# California Notice at Collection of Personal Information

Employees, Prospective Employees and Independent Contractors

Ovisto™ Wealth Management LLC (also referred to as “we,” “us,” and “our”) collects California Personal Information from our employees, prospective employees and independent contractors 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 see our [California Privacy Policy](#).

## 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, date of birth, mailing address, e-mail address, telephone number(s), signature, and sensitive information such as your Social Security Number, and driver’s license number or passport number.	<ul style="list-style-type: none"> <li>To identify you, communicate with you, process our payroll, and provide you with compensation and company-sponsored benefits.</li> <li>To comply with legal requirements.</li> </ul>	As required by law. Typically a minimum of four years after employment decision or termination of employment, whichever is longer.
Your bank account information.	<ul style="list-style-type: none"> <li>To direct deposit funds to your bank account, if you so instruct.</li> </ul>	As required by law. Typically a minimum of four years after termination of employment.
Health and medical information.	<ul style="list-style-type: none"> <li>To review and consider accommodation requests for non-standard work arrangements.</li> <li>To provide you with benefits and process claims.</li> </ul>	As required by law. Typically a minimum of four years after termination of employment.
Educational information, such as the educational institutions you have attended and your degrees.	<ul style="list-style-type: none"> <li>To determine your qualifications and make employment decisions.</li> </ul>	As required by law. Typically a minimum of four years after termination of employment.
Professional information, such as your employment history, professional licenses, certifications, and references.	<ul style="list-style-type: none"> <li>To determine your qualifications and make employment decisions.</li> <li>To promote and manage our business relationships.</li> </ul>	As required by law. Typically a minimum of four years after termination of employment.

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Information reported to us as a result of a consumer report or investigative consumer report that you authorize.	<ul style="list-style-type: none"> <li>To make employment decisions and to determine whether to entrust you with confidential information.</li> </ul>	As required by law. Typically a minimum of four years after termination of employment.
Visual information, such as images from security cameras in certain secure locations in our offices.	<ul style="list-style-type: none"> <li>To maintain the security of our premises, information and equipment.</li> </ul>	Typically 30 days, unless circumstances require us to retain this information for a longer period.
Visual information, such as your photograph.	<ul style="list-style-type: none"> <li>To promote our business.</li> <li>To maintain the security of our premises, information and equipment.</li> <li>To comply with legal requirements.</li> </ul>	Photographs for our employee directory are retained for 30 days after termination of employment. We retain photographs of group events for an unlimited period of time.
Information regarding your electronic network activity using our equipment, such as systems accessed, internet browsing history, usage and e-mail content.	<ul style="list-style-type: none"> <li>To monitor employee activities, to maintain the security of our systems, and to detect improper activity.</li> </ul>	Typically a minimum of four years after the termination of employment; longer in archived and back up storage.
Information regarding your electronic network activity on our website, <a href="http://www.ovistowealthmanagement.com">www.ovistowealthmanagement.com</a> , such as IP address, URL you came from, browsing history, and interaction with content on the website.	<ul style="list-style-type: none"> <li>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.</li> </ul>	Typically two months but possibly as long as 14 months.
Commercial information in connection with business-related expenses that you submit to us for reimbursement.	<ul style="list-style-type: none"> <li>To evaluate your expense report and to reimburse you for authorized expenses.</li> </ul>	Typically a minimum of four years after termination of employment.
Voluntary identification of your race/ethnicity, gender, age, disability status and veteran status (you have the option to choose not to self-identify).	<ul style="list-style-type: none"> <li>To comply with government reporting requirements.</li> <li>To respond to questionnaires from our clients, prospective clients, and business partners.</li> </ul>	As required by law. Typically a minimum of four years after the termination of employment, although some records may be kept longer as required.

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Records of your physical access to our parking facilities and secure areas in our offices.	<ul style="list-style-type: none"> <li>To maintain and monitor the security of our personnel, equipment, information and premises.</li> </ul>	Typically 30 days.
Your voluntary disclosure of medical information, such as whether you have been vaccinated for COVID-19.	<ul style="list-style-type: none"> <li>To maintain a healthy work environment.</li> </ul>	Typically a minimum of four years after the termination of employment.

### Information We Sell or Share

If you visit our public website [www.ovistowealthmanagement.com](http://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](#).