

California Privacy Policy

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

California Residents

Individual clients of Ovisto™ Wealth Management LLC (also referred to as “we,” “us,” and “our”) who reside in California have certain additional rights over the California Personal Information (“PI”) that we collect. This California Privacy Policy describes our information practices, the rights you may have with respect to the personal information we collect from and about you, and how you can exercise those rights.

Personal Information We Have Collected in the Past 12 Months

Categories of information we collect	Categories of sources	Purpose for which the information will be used
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"> You 	<ul style="list-style-type: none"> To provide services to you. To market our services to you. To provide you with information you have requested. To comply with legal requirements.
Sensitive personal information, such as your Social Security Number.	<ul style="list-style-type: none"> You 	<ul style="list-style-type: none"> To provide services to you.
Medical information, such as bills or receipts for medical expenses.	<ul style="list-style-type: none"> You Third parties that you authorize 	<ul style="list-style-type: none"> To provide services to you.
Commercial information, such as records of products or services purchased or considered.	<ul style="list-style-type: none"> You Third parties that you authorize 	<ul style="list-style-type: none"> To provide services to you. To market our services to you. To comply with legal requirements.
Commercial information, such as your bank account number or credit card number.	<ul style="list-style-type: none"> You Third parties that you authorize 	<ul style="list-style-type: none"> To process your payment(s) for our services.
Visual information, such as your photograph taken at our events.	<ul style="list-style-type: none"> You 	<ul style="list-style-type: none"> To market and promote our services.
Professional or employment-related information, including your profession, company name and contact information, email.	<ul style="list-style-type: none"> You 	<ul style="list-style-type: none"> To provide services to you. To market our services to you. To comply with legal requirements.

Categories of information we collect	Categories of sources	Purpose for which the information will be used
Inferences drawn from any of the information that we collect about you.	<ul style="list-style-type: none"> You 	<ul style="list-style-type: none"> To provide services to you. To market our services to you.
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"> You 	<ul style="list-style-type: none"> To evaluate activity on our website and to improve our website. To market our services to you or your organization. To monitor activities, to maintain the security of our systems, and to detect improper activity. To analyze traffic on our website, track your online activity and conversion events, and improve ad targeting.

Information We Have Sold or Shared in the Last 12 Months

We do not sell, share or disclose to third parties any California PI we collect from our individual clients for the purpose of providing professional services, including tax preparation services, advisory services or audits.

If you have visited our public website www.ovistowealthmanagement.com, we share your IP address, the URL you came from, and your interaction with the website with analytics providers, third-party advertising networks, and social media platforms for their use in cross-context behavioral advertising across multiple websites. 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](#).

Consumers Under the Age of 16

We do not have actual knowledge that we sell or share California Personal Information of minors under 16 years of age.

Sensitive Personal Information

We use and disclose sensitive California Personal Information only as permitted by law.

Your Privacy Rights

The right to know. You have the right to know what California Personal Information we have collected about you, including the categories of California Personal Information, the categories of sources from which the California Personal Information was collected, the business or commercial purpose for collecting, selling or sharing California Personal Information, the categories of third parties to whom we disclose California Personal Information, and the specific pieces of California Personal Information we have collected about you.

The right to delete. You have the right to delete California Personal Information that we have collected from you, subject to certain exceptions.

The right to correct. You have the right to correct inaccurate California Personal Information that we maintain about you.

The right to opt-out. You have the right to opt-out of the sale or sharing of your California Personal Information. You can visit our Notice of Right to Opt-Out of Sale or Sharing [here](#).

The right to limit use of sensitive personal information. If a business uses or discloses sensitive California Personal Information for reasons other than those permitted by law, you have the right to limit the use and disclosure of that information. We use or disclose sensitive California Personal Information only as permitted by law.

The right not to receive discriminatory treatment. You have the right not to receive discriminatory treatment by us for the exercise of your privacy rights, including the right not to be retaliated against for the exercise of your privacy rights.

How You Can Exercise Your Privacy Rights

You may exercise your privacy rights by calling 949-825-7181, or by completing the interactive web form accessible [here](#) or at <https://ovistowealthmanagement.com/contact/>.

We will confirm receipt of your request. We will acknowledge receipt of your request within 10 business days.

We will verify your identity. We will match pieces of personal information provided by you with personal information maintained by us that we have determined are reliable. We may also require that you submit a signed declaration under penalty of perjury stating that you are the individual whose personal information is the subject of the request. Our verification process will vary depending on the nature of your request and the sensitivity of the information. In some instances there may be no reasonable method by which we can verify your identity.

We will respond. We will respond to your request no later than 45 calendar days after we receive the request. If we cannot respond to your request within that time, we may notify you that we may take up to an additional 45 calendar days to respond, and we will explain why we need additional time.

You may designate an authorized agent to submit a request on your behalf. To have another person submit a request on your behalf, you or they may call us at 949-825-7181, or by completing the interactive web form accessible [here](#) or at <https://ovistowealthmanagement.com/contact/>. You will need to provide us with written permission authorizing the other person to submit a request to know or delete on your behalf. We will give you instructions on how to send the written authorization to us. We will still verify your identity and will verify that you have given your authority to another person.

How We Process Opt-Out Preference Signals

An opt-out preference signal is a signal that is sent by a platform or browser that clearly communicates your choice to opt-out of the sale and sharing of personal information. We process opt-out preference signals in a frictionless manner. You can implement an opt-out preference signal through the privacy controls available on your web browser, or by downloading a browser extension that can be enabled to support your single opt-out preference signal. Your opt-out preference signal will apply to your device's browser. To learn more about how to implement opt-out preference signals and global privacy controls, please consult your browser's privacy settings or visit [Global Privacy Control](#).

Contact for more Information

If you have questions or concerns about our information practices, you may contact us at <https://ovistowealthmanagement.com/contact/> or 949-825-7181. Alternatively, you may contact us at:

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