

PRIVACY NOTICE

Last updated June 16, 2022

This privacy notice for Purtill Financial LLC ("Company," "we," "us," or "our"), describes how and why we might collect, store, use, and/or share ("process") your information when you use our services ("Services").

Visit our website at <http://purtillfinancial.com>, or any website of ours that links to this privacy notice.

Questions or concerns? Reading this privacy notice will help you understand your privacy rights and choices. If you do not agree with our policies and practices, please do not use our Services. If you still have any questions or concerns, please contact advisor@purtillfinancial.com.

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1. SUMMARY OF KEY POINTS

This summary provides key points from our privacy notice, but you can find out more details about any of these topics below.

What personal information do we process? When you visit, use, or navigate our website, we may process your personal information only if you contact us at Purtill Financial LLC through our website.

Do we process any sensitive personal information? We do not process sensitive personal information unless contacted by the site user for follow up by Purtill Financial LLC.

Do we receive any information from third parties? We do not receive any information from third parties.

How do we process your information? We process your information to contact you directly per your request when requested as such through the Purtill Financial LLC website.

In what situations and with which parties do we share personal information? We do not share any information with third parties.

How do we keep your information safe? We have organizational and technical processes and procedures to protect your personal information. However no electronic transmission over the internet or information storage technology can be guaranteed to be 100% secure so we cannot promise or guarantee that hackers, cybercriminals or other unauthorized third parties will not be able to defeat our security and improperly collect, access, steal or modify your information.

What are your rights? Depending on where you are located geographically, the applicable privacy law may mean you have certain rights regarding your personal information.

2. WHAT INFORMATION DO WE COLLECT?

Personal information you disclose to us

In Short: We collect personal information that you choose to provide to us. We collect personal information that you voluntarily provide to us when you express an interest in obtaining information about us or our services, when you participate in our Services, or otherwise when you contact us.

Sensitive Information. We do not process sensitive information.

All personal information that you provide to us must be true, complete, and accurate, and you must notify us of any changes to such personal information.

3. HOW DO WE PROCESS YOUR INFORMATION?

In Short: We process your information to provide, improve, and administer our services, communicate with you, for security and fraud prevention, and to comply with law. We may also process your information for other purposes with your consent.

We process your personal information for a variety of reasons, depending on which of our Services you choose to use.

4. HOW LONG DO WE KEEP YOUR INFORMATION?

In Short: We keep your information for as long as necessary to fulfill the purposes outlined in this privacy notice unless otherwise required by law.

We will only keep your personal information as long as it is necessary for the purposes set out in this privacy notice, unless a longer retention period is required or permitted by law (such as tax, accounting, or other legal requirements).

When we have no ongoing legitimate business need to process your personal information, we will either delete or anonymize such information, or if this is not possible (for example, because your personal information has been stored in backup archives), then we will securely store your personal information and isolate it from any further processing until deletion is possible.

5. HOW DO WE KEEP YOUR INFORMATION SAFE?

In Short: We aim to protect your personal information through a system of organizational and technical security measures.

We have implemented appropriate and reasonable technical and organizational security measures designed to protect the security of any personal information we process. However, despite our safeguards and efforts to secure your Information, no electronic transmission over the internet or information storage technology can be guaranteed to be 100% secure, so we cannot promise or guarantee that hackers, cybercriminals, or other unauthorized third parties will not be able to defeat our security and improperly collect, access, steal or modify your information. Although we will do our best to protect your personal information, transmission of personal information to us through our website is at your own risk: you should only access the Services within a secure environment.

6. DO WE COLLECT INFORMATION FROM MINORS?

In Short: We do not knowingly collect data from or market to children under 18 years of age.

We do not knowingly solicit data from or market to children under 18 years of age. By using our Services, you represent that you are at least 18 or that you are the parent or guardian of such a minor and consent to such minor dependent's use of our Services. If we learn that personal information from users less than 18 years of age has been collected, we will deactivate the account and take reasonable measures to promptly delete such data from our records. If you become aware of any data we may have collected from children under age 18, please contact us at advisor@purtillfinancial.com.

7. WHAT ARE YOUR PRIVACY RIGHTS?

In Short: You may review, change, or terminate your account at any time.

Withdrawing your consent: If we are relying on your consent to process your personal contact information, which may be express and/or implied consent depending on the applicable law, you have the right to withdraw your consent at any time. You can withdraw your consent at any time by contacting us using the contact details provided in the section "HOW CAN YOU CONTACT US ABOUT THIS NOTICE?" below.

However, please note that this will not affect the lawfulness of the processing before its withdrawal, nor when applicable law allows, will it affect the processing of your personal information conducted in reliance on lawful processing grounds other than consent.

If you have questions or comments about your privacy rights, you may email us at advisor@purtillfinancial.com.

8. CONTROLS FOR DO-NOT-TRACK FEATURES

Most web browsers and some mobile operating systems and mobile applications include a Do-Not-Track ("DNT") feature or setting you can activate to signal your privacy preference not to have data about your online browsing activities monitored and collected. At this stage no uniform technology standard for recognizing and implementing DNT signals has been finalized. As such, we do not currently respond to DNT browser signals or any other mechanism that automatically communicates your choice not to be tracked online. If a standard for online tracking is adopted that we must follow in the future, we will inform you about that practice in a revised version of this privacy notice.

We have collected the following categories of personal information in the past twelve (12) months.

Category	Examples	Collected
Identifiers (extracted by site)	Contact details such as real name, alias, postal address, phone number, unique personal identifier, internet protocol address, email, and account name.	NO
Personal information categories listed in the California Customer Records statute	Name, contact information, email address, and financial information. (only as provided to the site by user)	YES
Protected classification characteristics under California or federal law	Gender and date of birth	NO
Commercial information	Transaction information, purchase history, and financial information.	NO
Biometric information	Fingerprints and voiceprints	NO
Internet or other similar network activity	Browsing history, search history, online behavior, interest data, and interactions with our and other websites, applications, systems, and advertisements.	NO
Geolocation data	Device location	NO
Audio, electronic, visual, thermal, olfactory, or similar information	Images and audio, video or call recordings created in connection with our business activities.	NO
Professional or employment-related information	Business contact details in order to provide you our services at a business level, or job title, work history, and professional qualifications if you apply for a job with us.	NO
Education information	Student records and directory information	NO
Inferences drawn from other personal information	Inferences drawn from any of the collected personal information listed above to create a profile or summary, for example, an individual's preferences and characteristics.	NO

We may also collect other personal information outside of these categories in instances where you interact with us in person, online, by phone, or mail in the context of:

- Receiving help through our client support channels;
- Participation in client surveys or content; and
- Facilitation in the delivery of our Services and how you respond to our inquiries

How do we use and share your personal information?

More information about our data collection and sharing practices can be found in this privacy notice. You may contact us by email at advisor@purtillfinancial.com, or by referring to our contact details at the bottom of this document.

If you are using an authorized agent to exercise your right to opt out, we may deny a request if the authorized agent does not submit proof that they have been validly authorized to act on your behalf.

Will your information be shared with anyone else?

In Short: No, we do not share any client information received through our website or otherwise.

Purtill Financial LLC has not disclosed or sold any personal information to third parties for a business or commercial purpose in the previous twelve (12) months. Purtill Financial LLC will not sell personal information in the future belonging to website visitors, users, and other consumers.

Your rights with respect to *your* personal data

Right to request deletion of your data - Request to delete

You can ask for the deletion of your personal information. If you ask us to delete your personal information, we will respect your request and delete your personal information. Subject to certain exceptions provided by law, such as (but not limited to) the exercise by another consumer of his or her right to free speech, our compliance requirements resulting from a legal obligation, or any processing that may be required to protect against illegal activities.

Right to be informed - Request to know

Depending on the circumstances, you have a right to know:

- whether we collect and use your personal information;
- the categories of personal information that we collect;
- the purposes for which the collected personal information is used;
- whether we sell your personal information to third parties;
- the categories of personal information that we sold or disclosed for a business purpose;
- the categories of third parties to whom the personal information was sold or disclosed for a business purpose; and
- the business or commercial purpose for collecting or selling personal information.

In accordance with applicable law, we are not obligated to provide or delete consumer information that is identified in response to a consumer request or to identify individual data to verify a consumer request.

Right to Non-Discrimination for the Exercise of a Consumer's Privacy Rights

We will not discriminate against you if you exercise your privacy rights.

9. DO WE MAKE UPDATES TO THIS NOTICE?

In Short: Yes, we will update this policy as necessary to stay compliant with relevant laws. We may update this privacy notice from time to time. The updated version will be indicated by an updated "Revised" date and the updated version will be effective as soon as it is accessible.

10. HOW CAN YOU CONTACT US ABOUT THIS NOTICE?

If you have questions or comments about this notice, you may email us at:

advisor@purtillfinancial.com

Or by mail:

Purtill Financial LLC
22 ALPHA PARK
HIGHLAND HEIGHTS, OH 44143-2208