

MARIS WEALTH MANAGEMENT LLC

4032 W TISCHER RD., DULUTH, MN 55803

(218) 451-0194 – TYLER@MARISWEALTHMANAGEMENT.COM

PRIVACY POLICY

Investment advisers are required by law to inform their clients of their policies regarding privacy of client information. We are bound by professional standards of confidentiality that are even more stringent than those required by law. Federal law gives the customer the right to limit some but not all sharing of personal information. It also requires us to tell you how we collect, share, and protect your personal information.

TYPES OF NONPUBLIC PERSONAL INFORMATION (NPI) WE COLLECT

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. This can include but is not limited to your Social Security Number, Date of Birth, Banking Information, Financial Account Numbers and/or Balances, Sources of Income, and Credit Card Numbers or Information. When you are no longer our customer, we may continue to share your information only as described in this notice.

PARTIES TO WHOM WE DISCLOSE INFORMATION

All Investment Advisers may need to share personal information to run their everyday business. In the section below, we list the reasons that we may share your personal information:

- For everyday business purposes – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus;
- For our marketing – to offer our products and services to you;
- For joint marketing with other financial companies;
- For our affiliates' everyday business purposes – information about your transactions and experiences and information about your creditworthiness; or
- For non-affiliates to market to you.

If you are a new customer we may begin sharing your information on the day you sign our agreement. When you are no longer our customer, we may continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.

PROTECTING CONFIDENTIALITY OF CURRENT AND FORMER CLIENT'S INFORMATION

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards and secured files and building.

FEDERAL LAW GIVES YOU THE RIGHT TO LIMIT SHARING – OPTING OUT

Federal law allows you the right to limit the sharing of your NPI by "opting-out" of the following: sharing for affiliates' everyday business purposes – information about your creditworthiness; or sharing with affiliates or non-affiliates who use your information to market to you. State laws and individual companies may give you additional rights to limit sharing. Please notify us immediately if you choose to opt out of these types of sharing.

DEFINITIONS: Affiliates – companies related by common ownership or control. They can be financial and non-financial companies; Non-affiliates – companies not related by common ownership or control. They can be financial and non-financial companies; Joint marketing – a formal agreement between non-affiliated financial companies that together market financial products or services to you.

WEBSITE TRACKING TECHNOLOGIES

This website utilizes cookies and tracking technologies to analyze website traffic and measure advertising effectiveness. The technologies currently in use include:

- **Meta Pixel** – a tracking tool provided by Meta Platforms, Inc. that collects anonymized data regarding visitor interactions with our website after engagement with our advertisements on Facebook and Instagram. This data is used to evaluate advertising performance and to present relevant content to prospective clients.
- **Google Analytics (GA4)** – a web analytics service provided by Google LLC that collects anonymized data about browsing behavior, including pages visited, session duration, and referral sources. This data is used to improve our website and understand how visitors engage with our content.

No personally identifiable financial information is collected through these tools. The data gathered is anonymized and is used solely for the purposes of analyzing website performance and advertising effectiveness. Third-party providers (Meta and Google) may receive this anonymized data in accordance with their respective privacy policies.

You may opt out of tracking by adjusting your browser's cookie settings, by utilizing the Google Analytics Opt-Out Browser Add-On (available at tools.google.com/dlpage/gaoptout), or by managing your ad preferences through Meta's settings (facebook.com/help/568137493302217).

THIRD-PARTY SERVICE PROVIDERS

In addition to the tracking technologies described above, this website utilizes the following third-party service providers to facilitate website functionality and client communication:

- **Netlify, Inc.** – provides website hosting and processes contact form submissions. Information submitted through website forms (name, email, phone, message content) is transmitted through Netlify's servers. Netlify's privacy policy is available at netlify.com/privacy.
- **Calendly, LLC** – provides online scheduling services for prospective and existing clients. Information you provide when booking an appointment (name, email, meeting preferences) is processed by Calendly. Calendly's privacy policy is available at calendly.com/privacy.
- **Anthropic, PBC (Claude AI)** – provides artificial intelligence services used in the educational Portfolio Builder tool on this website. Questionnaire responses submitted to the Portfolio Builder are processed by Anthropic's Claude AI to generate illustrative portfolio analysis narratives. These responses are not stored or retained by Maris Wealth Management or Anthropic beyond the duration of the request. No personally identifiable financial information is transmitted to this service. Anthropic's privacy policy is available at anthropic.com/privacy.
- **Mailchimp (Intuit Inc.)** – provides email marketing services. If you subscribe to our newsletter, your name and email address are stored and processed by Mailchimp. You may unsubscribe at any time. Mailchimp's privacy policy is available at mailchimp.com/legal/privacy.
- **Microsoft OneDrive** – used for secure document sharing with existing clients. Files shared through OneDrive are subject to Microsoft's privacy policies and enterprise security controls.

These third-party providers are used solely to facilitate the services described and are not authorized to use your information for any purpose other than providing those services. We do not sell or share personally identifiable information with these providers for marketing purposes.

Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.