

Privacy Policy

Connect Invest is committed to maintaining strong privacy protections for our users. Please read the information below describing the steps we take to ensure the privacy of your personally identifiable information. This Privacy Policy also explains your choices for managing information preferences, including opting out of certain uses of your personal information. Should you have any questions or need assistance in exercising any of your choices under this policy, please contact us at (866) 795-7558.

By accessing www.connectinvest.com you accept our Privacy Policy and Terms of Service and you consent to our collection, storage, use and disclosure of your personal information as outlined below.

Information We Collect

When using www.connectinvest.com, we may collect the following information:

Contact Information: When you contact us using our online contact form, we collect the messages you send as well as the personal information you provide, such as your name, phone number, and email address.

Application Information: We require certain personal information when you apply online for an Investor account. In addition to basic details such as your name, email address, and phone number, we may require information to verify your identity, such as your social security number and driver's license number

Log Data: When you access and use our website, we automatically record information concerning the device you are using and your activity on the Websites. This may include your device's Internet Protocol ("IP") address, your browser type, the types of information you search for and view on our website, locale preferences, location, identification numbers associated with your device, and your mobile carrier. If you arrived at one of our Websites by clicking on an advertisement, promotion, or search result on another website, we also take note of the web page you visited before you came to our Website.

Cookies: A "cookie" is a small data file that is transferred to your device. We use cookies to collect information to study, enhance and improve the use and capabilities of our website. We also use cookies to enable certain features of our website and to preserve your preferences and customize your experience when you visit and return to our websites. In addition, we and third parties acting on our behalf also use cookies to perform certain online advertising and analytics functions (discussed further below). Most browsers provide controls whereby you can choose to block receipt of cookies, delete cookies, or to be prompted before cookies are received. Please note that, if you delete or choose not to receive cookies from our website, the functionality of the websites may be impaired.

Geo-Location Information: Many mobile devices permit applications to access real-time location-based information. As of the effective date of this Disclosure, our mobile applications do not collect such information. However, we may do so in the future, with your consent, in order to enhance the features and functionality of our Websites and financial service offerings. In addition, some of the information we already collect, such as IP addresses, may be used to estimate an approximate location of the device you are using to access our Websites.

Additional information may be collected during your use of our website, or when we communicate with you via telephone, email or other means.

Information Collected from Third Parties

If you complete the account registration process, Connect Invest or our business partners may collect information from third parties to verify your identity and bank account information and assess risks related to your account.

How we Use your Information

We use your information to verify your identity, provide you with quality customer service, evaluate your request for an Investor account and improve our website. We may be obligated by law to retain certain communications and other information concerning you. In addition, we may retain and use communications, transaction details, and identifying information to maintain audit trails for security and anti-fraud purposes.

Connect Invest does not share information concerning you with unaffiliated third parties for marketing purposes. However, we may use your personal information to present you with information concerning offerings that may be of interest to you, via email.

Please note, the receipt of marketing communications via email is voluntary. If you do not wish to receive these communications, you may opt out at any time. To opt out please follow the steps below or contact us at (866) 795-7558 for assistance. If you choose to opt-out, you will continue to receive administrative emails from us.

Disclosure of Information

We disclose information concerning you as necessary to run our everyday business, such as in connection with the movement of funds. We also may disclose information concerning you if required to do so by law or if we believe that such action is necessary to comply with a legal obligation.

Online Tracking and Advertising

Like many website operators, we use services offered by third parties (including, but not limited to, Google, Twitter, and Facebook) to advertise on third party websites based on search terms used by you and your visits to our Websites. We also receive relevant history and Website usage information and information about your receipt and use of marketing emails from us collected by those third parties, including search terms that direct visitors to our Websites, and we use that information to improve our Websites and for our own marketing purposes. Those third parties use cookies, web beacons, pixels, or similar technology to provide these services to us and to serve ads and customize search results based in part on your visits to our Websites. You can set preferences for Google services using the Google Ad Settings page, and you can opt-out of Google Analytics' use of data by installing a browser ad-on available here. You can find information concerning personalized ads delivered by Twitter, as well as an opt-out from interest-based advertising, here. Other tools for opting out of targeted advertising are the Network Advertising Initiative (NAI) Opt-Out Page and the Digital Advertising Alliance (DAA) Consumer Choice Tool. Note that if you opt-out on the NAI page, or using the DAA tool, you will still see advertisements when you browse the Internet, but those advertisements may be less tailored to you

and your interests. The Websites may also use the services of AdTheorent, a DAA member, whose opt out page can be found here. Currently, various Internet browsers offer a “do not track” or “DNT” option that uses a DNT header to indicate the DNT preference setting on the browser. Because standards for DNT continue to evolve, we do not currently respond to browsers’ DNT signals with respect to the Websites. We do not track your activity over time and across different websites or online services. The third parties that collect data through our Websites and marketing emails may combine the data with other information they collect about your online activities over time, on other devices, and on other websites or apps, if those websites and apps also use the same third parties. We do not permit third-parties to collect information from the Websites for other websites or for their own purposes, except on a limited basis in connection with the analytics and advertising discussed in the preceding paragraph.

Security

Connect Invest is committed to maintaining the security of your information. When you supply information to us through our website, we use TLS (Transport Layer Security) or SSL (Secure Socket Layer) protocols to secure the transmission of information. Once we receive information, we store and protect it using industry-standard firewalls and other technology. Please remember, though, that no method of electronic transmission or storage is 100% secure.

Privacy of Children

The Connect Invest website is not intended for use by children under the age of 13. In order to use our services, you must be 18 years of age or older.

Your Choices, and How to Contact us

Customers can opt out of receiving marketing solicitations by emailing us at customerservice@connectinvest.com or visiting us at www.connectinvest.com.

Changes to our Privacy Policy:

We may need to make changes to our Privacy Policy from time to time, to reflect changes to our website or services, to accommodate new technology or legal requirements and guidelines. We will notify you of significant changes to our Privacy Policy by sending a notice to the primary email specified in your account. Significant changes will go into effect 30 days following such notification. Any immaterial changes or clarifications will go into effect immediately. We urge you to periodically check the website for updates.