

LOOKAHEAD WEALTH

PRIVACY POLICY

When you visit or use our website, your information is controlled by Lookahead Wealth (“**Lookahead Wealth**,”) and its affiliates, including Lookahead Advisory, LLC (“**Lookahead Advisory**,” and together with Lookahead Wealth, “**we**,” “**our**,” or “**us**”). We respect your privacy and are committed to protecting it through our compliance with this Privacy Policy (this “**Policy**”). Please read this Policy carefully to understand our policies and practices for collecting, using, maintaining, protecting, and disclosing your information. **If you do not agree with our policies and practices, your choice is not visit, access, use, or otherwise engage (collectively, “interact”) with us.** By interacting with this Website, or otherwise contacting us, you agree to this Policy. **This Policy does not apply to information we collect from you in the course of establishing, maintaining, or terminating a customer relationship with us, whether you are a current or former customer.** Such information is instead governed by our customer privacy practices and agreements provided to you pursuant to the Gramm-Leach-Bliley Financial Services Modernization Act (GLBA) and other federal laws.

This Policy describes the types of information we may collect from you or that you may provide when you:

- Interact with the Websites Lookaheadadvisory.com and Lookaheadwealth.com (collectively, our “**Websites**”).
- Email, call, or otherwise communicate with us (your “**Communications**”).
- Inquire about or participate in events we conduct (each an “**Event**” and collectively, our “**Events**”).

Our Website and Events, together with the content and services we provide, are collectively referred to herein as our “**Services**”.

This Policy does not cover information collected by third parties. For example, if you click on a link on our Website that takes you to another site, any data collected on that third-party site is not covered by this Policy unless explicitly mentioned. The information we collect is governed by this Policy, while the information collected by the third party is subject to their privacy practices. Privacy choices you make on a third-party site or platform will not apply to our use of the information we have collected. We are not responsible for third parties’ privacy practices and encourage you to be aware when you leave our Website and to read the privacy policies of other sites that may collect your information.

We may provide additional data privacy notices specific to certain practices or regions. Those terms are to be read in conjunction with this Policy. This Policy may

change from time to time (see [Changes to Our Privacy Policy](#)). Your continued interaction with our Services after we make changes is deemed to be acceptance of those changes, so please check this Policy periodically for updates.

Children Under the Age of 18

Our Website is not intended for children under 18 years of age. No one under age 18 is permitted to provide any information on or to our Website. We do not knowingly collect information from children under 18. If you are under 18, do not use or provide any information on our Website. Do not, through any of its features or provide any information about yourself to us, including your name, address, telephone number, or email address. If we learn we have collected or received personally identifiable information from a child under 18, we will delete that information. If you believe we might have any personally identifiable information from or about a child under 18, please contact us by email at hello@lookaheadadvisory.com or telephone at (503) 479-4122.

Types of Information We Collect

We collect two basic types of information:

- Information that identifies (whether directly or indirectly) a particular individual, such as your name, postal address, email address, date of birth, and telephone number (“**Personal Information**”); and
- Information that does not directly or indirectly identify, and cannot reasonably be used to identify, an individual (“**Anonymous Information**”). When Anonymous Information is directly or indirectly associated with Personal Information, the resulting information is also treated as Personal Information.

We may use Personal Information and Anonymous Information to create a third type of information: information about groups or categories of individuals, which does not identify and cannot reasonably be used to identify an individual (“**Aggregate Information**”).

In particular, we collect the following categories of data:

- **Contact information** you provide when you request information, sign-up for our newsletter, participate in an Event, or otherwise contact us, such as your name, email address, telephone number, and address of residency.
- **Activity, usage, viewing, technical, and device data** when you visit our Website or open emails we send. This includes the content you view, how often you use our Website, your browser or device type, unique device identifier, and IP address. We may obtain this information from a third party, such as a site or platform provider.

How We Collect Your Information

We may collect information from you in the following ways:

- **Directly From You.** We collect information you provide to us when you request information from us, sign-up for our newsletter, or otherwise interact with us using one or more devices. You may provide information in a variety of ways, including by typing or using voice commands.
- **Through Automatic Technologies.** We collect information through a variety of technologies, such as cookies, click tracking, web beacon, pixels, and analytics tools, including when you visit our Website. Please see Automatic Technologies We Use for further information and Your Controls and Choices for how to disable cookies and otherwise make choices with respect to such data collection.
- **From Third Party Service Providers.** We acquire information from other third parties to update or supplement the information you provided, or we collected automatically. Applicable law may require that you authorize the third party to share your information with us before we can acquire it.

Automatic Technologies We Use

The technologies we use to automatically collect your information when you interact with our Website include:

- **Cookies (or browser cookies).** A cookie is a small file placed on the hard drive of your computer. You may refuse to accept browser cookies by activating the appropriate setting on your browser. However, if you select this setting, you may be unable to access certain parts of our Website. Unless you have adjusted your browser setting so that it will refuse cookies, our system will issue cookies when you direct your browser to our Website.
- **Click Tracking.** Click tracking is an analytical feature that measures and reports where users click or tap on our Website. Every time you click on our Website, we record the event and log your user session for future analysis. We use this information only to improve our Services. Click tracking only collects the IP address assigned to you on the date when you visit our Website, rather than your name or other identifying information.
- **Web Beacons.** A web beacon is a small electronic file (sometimes called a clear gif, pixel tag, or single-pixel gif) that allows us to track certain user actions, such as counting users who have visited particular pages or opened an email, or for other related website statistics. Web beacons are not stored on your computer like cookies, but they may work in conjunction with cookies to help us better understand how our Website is being used.
- **Analytics.** We collect analytics information from our web server and analytics vendor. This includes information such as how many users visit our Website, what pages they visit when they do so, what other sites were visited

prior to coming to our Website, and IP addresses. We use the information we get from analytics tools only to improve our Services.

How We Use Your Information

Consistent with applicable law and choices and controls that may be available to you, we may use information collected from you, or from devices associated with you to:

- To make our Website usable by enabling basic functions, like page loading, account sign-in, and filling out forms.
- To monitor Website traffic and activity.
- To maintain security, enable fraud detection, and provide trouble-shooting and support
- To facilitate an action initiated by you, such as setting or detecting your privacy settings.
- To establish and maintain a logged-in connection while you are in the secure section(s) of our Website. For example, when you visit your account, perform transactions, update contact information or perform other activity a “cookie” allows you to navigate from page to page in a secure fashion without having to repeatedly log in.
- To enable us to personalize your experience on our Website by remembering your online preferences including, but not limited to, your preferred language, web layout, or location settings.
- To detect your browser and device capabilities for displaying our Website content.

How We Share Your Information

We will not share your Personal Information with a third party except in limited circumstances, including:

- When we work with service providers performing services on our behalf, including with fulfillment companies, securities clearinghouses, data processing services, printers, and mailing facilities; however, these companies are prohibited from using your Personal Information for purposes other than those requested by us or required by law. This includes sharing your:
 - **Contact information** with our email marketing services provider to manage newsletter sign-ups and communications, and with our web hosting providers to ensure the proper functioning of our Website.
 - **Activity, usage, viewing, technical, and device data** with our analytics companies and marketing services providers to understand how you interact with our emails, and Website, and with our web hosting provider to ensure the proper functioning of our Website.
- When we work with other Lookahead Advisory entities as permitted by law;

- We may share your Personal Information with third parties in connection with the sale of a business, to ensure the safety and security of our users, customers, employees, or other third parties, to protect our rights and property and the rights and property of our users, customers, employees, or other third parties, to comply with legal process, or in other cases if we believe in good faith that disclosure is required by law.

Please note that, except as otherwise stated above, once we share your Personal Information with another company in the above circumstances, the information received by the other company is controlled by that company and becomes subject to its privacy practices.

Your Controls and Choices

In accordance with applicable law, your controls and choices may include:

- Correcting, updating, and deleting your customer account.
- Choosing or changing your choices for subscriptions, newsletters, emails, alerts, text messages, or other notifications.
- Setting your browser to refuse all or some browser cookies, or to alert you when cookies are being sent. If you disable or refuse cookies, please note that some parts of our Website may then be inaccessible or not function properly.
- Setting your browser to transmit “Do Not Track” signals.
- Choosing whether to receive from us offers and promotions for our Services that we think may be of interest to you.
- Requesting access to the Personal Information we hold about you and that we amend or delete it.

You may exercise these controls and choices in various ways, including as outlined above, by email hello@lookaheadadvisory.com or by telephone at (503) 479-4122.

We may not accommodate a request if we believe the request would violate any law or legal requirement or cause the information to be incorrect.

Please be aware that if you do not allow us to collect Personal Information from you, we may not be able to deliver certain experiences and services to you, and some of our services may not be able to take account of your interests and preferences. If you have questions about the specific Personal Information about you that we process or retain, and your rights regarding that Personal Information, please contact us by email hello@lookaheadadvisory.com or by telephone at (503) 479-4122.

Opt Out Preference Signals And Do Not Track

You or your authorized agent may choose to enable online, where available, a universal tool that automatically communicates your opt-out preferences, such as

the Global Privacy Control (“GPC”). We will process the GPC signal as a request to opt out.

Data Security, Integrity, and Retention

The security, integrity, and confidentiality of your information are very important to us. We have implemented technical, administrative, and physical security measures that are designed to protect your information from unauthorized access, disclosure, use, and modification. We regularly review our security procedures to consider appropriate new technology and methods. Please be aware that, despite our best efforts, no security measures are perfect or impenetrable. We retain your Personal Information for the length of time needed to fulfill the purposes outlined in this Policy unless a longer retention period is required or permitted by law.

Data Transfers, Storage, and Processing

We will take reasonable steps to safeguard the privacy of your Personal Information. These steps may include standard contractual clauses where and if required by law, obtaining your consent, or other lawful means of transferring Personal Information.

Changes to this Policy

From time to time, we may change this Policy to accommodate new technologies, industry practices, regulatory requirements, or for other purposes. We will provide notice to you if these changes are material and, where required by applicable law, we will obtain your consent. Notice may be by email to you at the last email address you provided us, by posting notice of such changes on our Website or by other means, consistent with applicable law.

Your State Privacy Rights

Certain states have consumer privacy laws that provide their residents with additional rights regarding our use of their personal information. We do not currently meet the thresholds to be subject to any state consumer privacy laws. We do not currently sell data triggering Nevada’s Senate Bill 2020 privacy law out-of-state requirements. However, if you have questions or requests regarding your data, you may contact us by email at hello@lookaheadadvisory.com or by telephone at (503) 479-4122.

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