

## PRIVACY POLICY

Most Recent Update: 10/25/24

This Privacy Policy explains how Ortiz Advising and its affiliates collect, use and disclose personal information of its customers, prospective customers, and visitors to its website at [ortizadvising.com](http://ortizadvising.com).

### COLLECTION OF PERSONAL INFORMATION:

Information collected directly from you: We may collect personal information directly from you, for example information we collect directly from you may include your email and phone number. Information collected from your device: Our website may use tracking technologies such as cookies, web beacons, pixels, and other similar technologies to automatically collect certain information from your device, including for example, cookies to personalize your experience and enable certain features. You may disable cookies in your web browser however parts of our website may not function properly. More information about blocking and deleting through a web form; during an online registration, first and last name, address, email address, and your IP address, browser and operating system information, geographic location, referring website address, and other information about how you interact with the website such as cookies is available at <http://www.allaboutcookies.org>. Our email campaigns may also use tracking technologies such as web beacons, pixels and other similar technologies to automatically collect certain information such as your IP address, browser type and version, and email engagement statistics.

### USE OF PERSONAL INFORMATION:

We use information collected directly from you to provide you with [our products and services, customer service and support, and other relevant information.] We may also use this information to market our products and services to you, including by email and text message subject to your consent.

### DISCLOSURE OF PERSONAL INFORMATION:

We may use third-party service providers to assist us with providing and marketing our products and services to you and we may share your information with such third parties for these limited purposes.

We may also share your personal information if necessary to comply with applicable laws and regulations, to respond to a subpoena, search warrant or other lawful request for information we receive, or to otherwise protect our rights.

### EMAIL AND TEXT MESSAGE COMMUNICATIONS

If you wish to unsubscribe from our email campaigns, please click on the Unsubscribe link at the bottom of any marketing email sent from us. If you wish to stop receiving text messages from us, reply STOP, QUIT, CANCEL, OPT-OUT, or UNSUBSCRIBE to any text message sent from us.

### CHANGES TO THE THIS PRIVACY POLICY

We may update this Privacy Policy at any time. Please review it frequently.

### CONTACT INFORMATION

If you have any questions about this policy or our privacy practices, please contact us at 800-710-7595.