

# Privacy Policy

Last Updated: March 1, 2026

## 1.1 About this Privacy Policy.

The Agents Advisor, LLC. and its affiliates (together, "**TAA**", "**we**" or "**us**") provides a platform to connect business with third-party products, services and/or financial service providers (the "**Services**"), accessed through our website at **www.TheAgentsAdvisor.com** (together, "**Site**", "Advisor TV", "Advisor Radio", or "ADVISOR IN ACTION"). This privacy policy ("**Privacy Policy**"), along with the **Terms of Use**, provides the terms upon which you use our Site. By visiting the Site, you agree to be bound by these terms and that you are of legal age to be so bound. If you disagree with any term, you should not visit our Site. Reading this Privacy Policy will help you understand how we collect, store, and use information about you when you visit our Site.

### 1.1.1 Third-party sites.

Our site may include links to third-party sites. This Privacy Policy only applies to our Site and does not apply to any third-party website to which the Site may link. Should you choose to visit these third-party sites, you should review their privacy policies to ensure that you understand and are comfortable with their practices.

## 2.1 Information We Collect.

There are three general categories of information we collect: 1. information you give us; 2. information we automatically collect via technology; and 3. information we receive from third parties.

### 2.1.1 Information you give us.

To access the Services provided through our Site, you must provide us with certain information about your business and yourself.

#### 2.1.1.1 Business Information.

The business information you may provide includes, without limitation: name, company name, company address, company telephone number, company/personal mobile telephone number, company email address, company website, industry, estimated financial information, financing purpose/details, desired financing details, date business was formed, and the reason for your search on our site. At other times in the process, you may have to upload certain business documents, including financial statements or other business documents that may include personal information about you, your agents, or your customers.

### **2.1.1.2 Business Owner and/or Agent Information.**

To create an account, you must provide your personal information such as your name, company role/title, email address, and phone number. Additional personal information about the business owner(s) or agent(s) may also be required for other purposes.

### **2.1.1.3 Financial Service Provider Information.**

The lender information you may provide includes, without limitation: company name, company address, industry focus, preferred lending criteria, preferred financing purpose, and preferred transaction size for financing opportunities. We will also ask you and you may provide your company website, or any company email address.

### **2.1.1.4 Financial Service Provider Affiliated Personnel and/or Agent Information.**

To create an account, you must provide your personal information such as your name, company role/title, company email address, and phone number. Additional personal information about you may also be required for other purposes.

## **2.1.2 Communications on our Site.**

You may communicate with us via our Site and you may also communicate with third-party financial institutions via our Site. We collect and retain all of these communications for a minimum of three (3) years in accordance with our own internal policies and applicable legal requirements.

## **2.1.3 Information we automatically collect using technology.**

When you use our Site, we automatically collect personal information about the services you use and how you use them. This information is necessary to improve our services and understand how best to serve you. SMS consent is not shared with third parties (except for SMS providers).

### **2.1.3.1 Usage Information.**

We may collect information about you through technology. For example, we may collect your IP address each time you request a page during a visit to the Site. (An IP address is often associated with the portal through which you enter the Internet.) At times, we may also use IP addresses to collect information regarding the frequency with which users browse various parts of the Site.

### **2.1.3.2 Tracking Analytics.**

The Site may also use other technical methods to track and analyze the traffic patterns on the Site, such as the frequency with which our users visit various parts of the Site. These technical methods may involve the transmission of information either directly to us or to another party authorized by us to collect information on our behalf. We may also use these technical methods in HTML e-mails that we send our Site users to

determine whether such users have opened those e-mails and/or clicked on links in those e-mails. We may collect the information from use of these technical methods in a form that is personally identifiable.

### **2.1.3.3 Software tools.**

During some visits we may use software tools to measure and collect session information, including page response times, download errors, length of visits to certain pages, page interaction information (such as scrolling, clicks, and mouse overs), and methods used to browse away from the page. We may use this information to measure Site activity, to develop ideas for improving our websites and for any other purpose to the extent permitted by applicable law.

### **2.1.3.4 Web beacons.**

Pages of our Site and our e-mails may contain small electronic files known as web beacons (also referred to as clear gifs, pixel tags, and single-pixel gifs) that permit us, for example, to count users who have visited those pages or opened an email and for other related website statistics (for example, recording the popularity of certain Site content and verifying system and server integrity).

### **2.1.3.5 Third party analytical services.**

In operating our business, we use certain third-party analytical services, including but not limited to Google Analytics Advertiser Features. Advertiser features include: Remarketing with Google Analytics; Google Display Network Impression Reporting; DoubleClick Platform integrations; Google Analytics Demographics and Interest Reporting, among others. By enabling these features, certain third parties require us to disclose the use of these features to our users and, specifically, that we and third-party vendors use first-party cookies (such as the Google Analytics cookie) or other first-party identifiers, and third-party cookies (such as the DoubleClick cookie) or other third-party identifiers together to gather data about your activities on our Services. In particular, the "Remarketing" feature allows us to reach people who previously visited our Services and match the right audience with the right advertising message.

#### **2.1.3.5.1 Opting Out.**

You may opt out of the automated collection of information by **third-party ad networks for the purpose of delivering advertisements tailored to your interests**, by visiting the consumer opt-out page for the Self-Regulatory Principles for Online Behavioral Advertising at <http://www.aboutads.info/choices/> and edit or opt-out your Google Display Network ads' preferences at <http://www.google.com/ads/preferences/>. Because those opt-out and preference control pages are specific to the individual browser used to visit it, and because that page is not operated by the Company, we are unable to perform the opt-outs on your behalf. You can opt out of receiving targeted ads from members of the Network Advertising Initiative ("NAI") on the NAI's website.

#### **2.1.3.6 Cookies and How We Use Them.**

Cookies are small text files that may be placed on your browser when you visit our web site. Cookies are used primarily for administrative purposes, to improve your experience with our web site. For instance, when you return to the Site after logging in, cookies provide information to the Site, including personal information, so that the Site will remember who you are.

Our Site also uses cookies to capture analytics to improve our web site experience and performance. This includes compiling statistical information concerning, among other things, the frequency of use of our site, the pages visited, and the length of each visit, as well as information about your computer, operating system, browser, language, and country. We do not use cookies to store any personal information that could be read or understood by others.

When you visit our Site, a pop-up box at the bottom of the page will prompt you to Accept all Cookies or to access your settings in order to limit Cookies. Using the settings of your Internet browser, you can choose to have your computer warn you each time a cookie is being sent, or you can choose to turn off all cookies. Consult your browser Help menu to learn the correct way to modify your cookies. If you choose to turn off cookies, you may not have access to many features that make your browsing of our Site smoother, and some of our services may not function properly. You may at any time delete any cookies set by using the relevant option of your Internet browser or by deleting the cookies on your hard drive.

If you continue without changing your settings, we'll assume that you accept receipt of all cookies on the Site.

#### **2.1.4 Information We Receive from Third Parties.**

We may purchase data about our customers from third parties and combine it with information we already have about you, to create more tailored products. If you provide information about others, or if others give us your information, we will only use that information for the specific reason for which it was provided to us. Any information obtained from a third-party will be used to assist matching your business with various lenders.

### **3.1 Our Use of Your Personally Identifiable Information**

#### **3.1.1 Disclosure & Non-Disclosure.**

TAA does not disclose any nonpublic personally identifiable information about its Site users to any nonaffiliated third party, except as set forth herein. We may use or disclose certain personally identifiable information we collect about you when you visit and browse the Site as part of our normal business operations to provide you with our Services, or to send you administrative communications either about your interactions with us or about features of the Site, including any future changes to this Privacy Policy.

### **3.1.2 Storage.**

We may also store your personally identifiable information as required by law or our own internal policies. We may use this information for marketing, research, and other business purposes, and we may associate other information we collect about you, such as details about your usage patterns and interests, but we will not sell this information or disclose it to nonaffiliated third parties. We are required by law to store certain information and communications for three years and, in some instances, for longer periods of time.

### **3.1.3 Third-Party Providers.**

We may also use service providers to facilitate our services or platform functions on our behalf. These companies and individuals may have access to your personally identifiable information, as needed to perform their functions, but may not use it for another purpose.

### **3.1.4 Legally Required Disclosures.**

We will use or disclose personally identifiable information when we believe that such disclosures are required by law, regulation, legal process, subpoena, document request or governmental request. We may also do so to help enforce our Terms of Use, protect your safety or security, including the safety and security of property that belongs to you, or protect the safety and security of our websites, databases or third parties, including the safety and security of tangible or intangible property that belongs to us or to third parties. Also, if TAA, or substantially all of the assets of TAA or one or more of its businesses, are acquired or merged with another entity, whether an affiliate or a third party, user information may be one of the transferred assets. We may transfer all user information (which may include personally identifiable information) to our acquirers or successors.

### **3.1.5 Other Legal Uses.**

Notwithstanding the foregoing, TAA reserves the right to use any personally identifiable information in any manner permitted by law.

## **3.2 How We Use Your Non-Personally Identifiable Information.**

Non-personally identifiable information is information that does not personally identify you, including anonymous information and aggregate data. We may use this information to understand better how our visitors use the Site, research our visitors' demographics, interests, and behavior, improve the Site, provide visitors with customized services and information, and for other similar purposes. We may combine this information with personally identifiable information. We may share this information with others, such as investors, for information or promotional purposes, and may use this information in any manner permitted by law, but any disclosure that identifies you personally will be governed by Section 3.1.

### **3.3 How Your Information May Be Used by Financial Service Providers.**

If you submit a request for information from a financial service provider that you were matched with through our Services, you expressly consent to the service provider conducting any research necessary to provide you with the information you requested. For example, to provide more accurate information, including specific quotes and rates, financial service providers may need to obtain additional background information about you, such as ordering consumer and credit reports to determine your eligibility for and price of certain financial products and services. These reports may also be used for maintenance of any of the products or services you obtain going forward. The financial service provider may engage third parties in connection with these reports. If you do not want service providers to conduct the necessary research to provide the relevant information, then you should not submit such request. Because the collection and use of this information is subject to the privacy policies of the relevant service providers, and not this Policy, you should review those policies with care.

### **4.1 Protection of Information.**

We endeavor to protect your personally identifiable information. We use technical, administrative, and physical methods to maintain the integrity and security of our databases, including firewalls. These measures include the use of Secure Socket Layer (SSL) technology during platform transactions and administrative access to site data, as well as other proprietary security measures which are applied to all repositories and transfers of user information. Please be aware though that there is no such thing as "perfect security" on the Internet, and third parties may unlawfully intercept or access transmissions, private communications, or databases. We cannot ensure or warrant the security of any information transmitted to us over the Internet and hence accept no liability for any unintentional disclosure. For further information, please see our Terms of Use.

### **4.2 Notification.**

In the event there is a data breach at TAA that impacts your personally identifiable information, we will notify you within 45 days. We will notify you that a breach occurred, what type of information was breached, when the breach occurred, what steps you can follow to further protect your information, what actions we are taking regarding the breach and what steps we are taking to ensure the breach does not happen again.

### **4.3 Do Not Track.**

TAA does not respond to Do Not Track ("DNT") signals. We do not track our customers over time and across third party websites; however, we do use third-party analytical services that may track you. See Section 2.1.3.5 for more about third-party analytical services.

### **4.4 Children.**

Although this Site is not targeted toward children, we are concerned about the safety

and privacy of children who use the Internet. If a child under 13 has provided personally identifiable information to us through the Site, a parent or guardian may inform us at [info@theagentsadvisor.com](mailto:info@theagentsadvisor.com) and we will use commercially reasonable efforts to delete it from our database, subject to applicable law and this Privacy Policy.

#### **4.5 Choice/Opt-Out & Account Cancellation.**

You may choose to stop receiving our newsletter or marketing emails by following the unsubscribe instructions included in these emails or you can contact us at [info@theagentsadvisor.com](mailto:info@theagentsadvisor.com).

You can choose not to provide us with certain information, but this will likely result in the inability to use certain features of the Site and to obtain the Services you are seeking.

If, after signing up for our Services, you decide you no longer wish to receive our Services or future contact from lenders, brokers, or other third parties to which your information has been referred, you may cancel your account by sending an email to [info@theagentsadvisor.com](mailto:info@theagentsadvisor.com). Upon cancelling your account, your information will no longer be sent to lenders, brokers, or other third parties. This does not guarantee that these lenders, brokers, or other third parties to which we have already sent information will cease contacting you or using your information. Please be sure to reach out to all lenders, brokers, and/or other third parties to ensure they cease contacting you.

Certain federal and state regulations require that we maintain a record of your information for certain periods of time. Due to these regulations, we may be unable to completely delete your information from our database until the time requirements of these regulations have expired.

#### **4.6 International Use.**

Our Services are governed by the laws of the United States. Our Site is intended for United States Businesses and to be accessed from a physical location within the United States only. We make no representation that our Services are operated in accordance with the laws of any other nation. If you access this website from outside the United States, you do so at your own risk. By sending us your data, you consent to its transfer to and storage within the United States. Those who access the Site from outside the United States do so on their own initiative and are responsible for compliance with local laws, rules, and regulations.

#### **5.1 Limitation of Liability and Disclaimers.**

Please refer to the Terms of Use, found here, for additional important disclaimers and limitations of liability applicable to our Site usage.

**IN NO EVENT WILL TAA OR ITS RELATED PERSONS (AS DEFINED BELOW) BE LIABLE TO ANY PARTY FOR ANY CLAIMS, LIABILITIES, LOSSES, COSTS OR DAMAGES, INCLUDING BUT NOT LIMITED TO ANY DIRECT, INDIRECT, PUNITIVE, SPECIAL, INCIDENTAL, OR CONSEQUENTIAL DAMAGES ("DAMAGES") ARISING OUT OF OR IN CONNECTION WITH ANY ACCESS, USE (OR INABILITY TO USE)**

**OR DISTRIBUTION OF THE SITE, INCLUDING DAMAGES CAUSED BY ANY FAILURE OF PERFORMANCE, ERROR, OMISSION, INTERRUPTION, DELETION, DEFECT, DELAY IN OPERATION OR TRANSMISSION, COMPUTER VIRUS, COMMUNICATION LINE FAILURE, THEFT, DESTRUCTION OR UNAUTHORIZED ACCESS TO, ALTERATION OF OR USE OF ANY ASSET, WHETHER FOR BREACH OF CONTRACT, TORTIOUS BEHAVIOR, NEGLIGENCE OR UNDER ANY OTHER CAUSE OF ACTION, OR ANY CONTENT OBTAINED THROUGH USE OF THE SITE. THIS IS TRUE EVEN IF TAA HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES OR LOSSES.**

**TAA its affiliates and their respective officers, directors, managers, partners, members, shareholders, employees, affiliates and agents (collectively "Related Persons") make no representations or warranties and specifically disclaim any and all warranties of any kind, express or implied, with respect to the Site, including any representations or warranties with respect to merchantability, fitness for a particular purpose, title, non-infringement, availability, security, accuracy, freedom from viruses or malware, completeness, timeliness, functionality, reliability, sequencing or speed of delivery.**

**While we use reasonable efforts to obtain information from reliable sources, TAA does not warrant that the information in this Site is accurate, reliable, complete, or correct, that this Site will be available at any particular time or location. Such information or materials are provided "as is" and "as available". Please be aware that there is no such thing as "perfect security" on the Internet, and third parties may unlawfully intercept or access transmissions or private communications, and accordingly electronic mail and other transmissions to and from the Site or made via the Site may not be secure.**

#### **6.1. Notification of Privacy Policy Changes.**

We may update this privacy policy to reflect changes to our information practices. If we make any material changes, we will notify you by email (sent to the email address specified in your account) or by means of a notice on this Site. We encourage you to periodically review this page for the latest information on our privacy policy. When we make changes to this Privacy Policy we will revise the revision date at the top of the Privacy Policy.

#### **6.2. For Vermont Residents.**

Vermont law places additional limits on sharing information about Vermont residents so long as they remain residents of Vermont. In accordance with Vermont law, we will not share information we collect about Vermont residents to companies outside of TAA except: (1) As permitted by law; (2) To companies that perform marketing or other services on our behalf; (3) Name, contact and transaction and experience information to other financial institutions with which we have joint marketing agreements; or (4) With the authorization or consent of the Vermont resident. We also will not share non-transactional information about Vermont residents received from others within the TAA family of companies except with the authorization or consent of the Vermont resident.

### **6.3. For Nevada residents only.**

You may be placed on our internal Do Not Contact List by contacting us via [info@theagentsadvisor.com](mailto:info@theagentsadvisor.com). Nevada law requires we provide the following contact information: Bureau of Consumer Protection, Office of the Nevada Attorney General, 555 E. Washington St., Suite 3900, Las Vegas, NV 89101; Phone number: 702.486.3132; email: [aginfo@ag.nv.gov](mailto:aginfo@ag.nv.gov). See Section 6.6 below for our contact information.

### **6.4. For California Residents only.**

If you are a California resident, you may be entitled to additional rights over your personal information. For more information about those rights and how to exercise them, please see our California Privacy Notice (referenced in Attachment A), which only applies to California residents and **only when TAA is required to meet CCPA regulations**.

### **6.5. Other States.**

State law: We follow state law where state law provides you with additional privacy protections.

### **6.6. Contact Information.**

**You can contact us about this privacy policy by writing, via email, at the following address: Email: [info@theagentsadvisor.com](mailto:info@theagentsadvisor.com)**

## **Attachment A: California Privacy Notice**

We adopt this notice to comply with the California Consumer Privacy Act of 2018 (CCPA). If you are a resident of California, and when TAA is required to meet CCPA regulations per <https://oag.ca.gov/privacy/ccpa>, in addition to the rights set forth in this

#### **Privacy Policy:**

- We will not share any personal information about you with third parties to the extent prohibited by applicable California law or to the extent your prior consent to share is required by applicable California law; and
- You have the right to request information from us regarding the manner in which we share certain categories of information with third parties for their direct marketing purposes. California law gives you the right to send us a request at a designated address to receive the following information:
  - the categories of information we disclosed to third parties for their direct marketing purposes during the preceding calendar year;
  - the names and addresses of the third parties that received that information; and
  - if the nature of the third party's business cannot be determined from their name, examples of products or services marketed.

We may provide this information in a standardized format that is not specific to your situation. You may also request corrections to your data or that we delete your data, provided that in some instances other legal requirements will nullify your deletion request. Requests may be sent to [info@theagentsadvisor.com](mailto:info@theagentsadvisor.com) or you may submit your request via our Site at [www.theagentsadvisor.com](http://www.theagentsadvisor.com).

If you are a California resident, you may designate an authorized agent to make a request to access or a request to delete personal information on your behalf. We will respond to your authorized agent's request if they submit proof that they are registered with the California Secretary of State to be able to act on your behalf or submit evidence you have provided them with power of attorney pursuant to California Probate Code section 4000 to 4465. We may deny requests from authorized agents who do not submit proof that they have been authorized by you to act on their behalf or are unable to verify their identity.

End of Privacy Policy