Rev. August 2026

FACTS WHAT DOES SAVVY LABS DO WITH YOUR PERSONAL INFORMATION?

Questions? Email hello@savvylabs.com or go to www.getsavvy.io/privacy

Why?

Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

What?

The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security number and investment experience
- Income and assets
- Account balances and account transactions

When you are no longer our customer, we continue to share your information as described in this notice.

How?

All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons Savvy Labs chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Savvy Labs share?	Can you limit this sharing?
For our everyday business purposes— Such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, report to credit bureaus, or engage vendors, service providers, and analytics providers who perform services on our behalf	Yes	No
For our marketing purposes— To offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	No
For our affiliates' everyday business purposes— Information about your transactions and experiences	No	We don't share
For our affiliates' everyday business purposes— Information about your creditworthiness	No	We don't share
For nonaffiliates to market to you	No	We don't share

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Who we are	
Who is providing this notice?	Savvy Labs Inc. (“Savvy Labs”)

What we do	
How does Savvy Labs protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does Savvy Labs collect my personal information?	We collect your personal information, for example, when you: • Open an account or give us your contact information • Seek advice about your investments or tell us about your investment portfolio • Enter into an investment advisory contract We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only • Sharing for affiliates' everyday business purposes, information about your creditworthiness • Affiliates from using your information to market to you • Sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. • *Savvy Labs has no affiliates.*
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. • *Savvy Labs does not share with nonaffiliates so they can market their own products or services to you.* • *We may share information with nonaffiliate vendors, service providers, and analytics providers solely to service your account and operate our business; these providers are contractually restricted from using your information for their own marketing purposes.*
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. • *Our joint marketing relationships may include registered investment advisors and other investment management firms.*

Other important information	
California	We will not share information we collect about you with companies outside of Savvy Labs, unless permitted by law. We also limit sharing among Savvy Labs and our affiliate companies, if any, to the extent required by California law.
Nevada residents	We are providing this notice to you pursuant to state law. Nevada law requires us to disclose that you may request to be placed on our internal “Do Not Call” list at any time by emailing hello@savvylabs.com, and that you may obtain further information by contacting the Nevada Attorney General, 555 E. Washington Ave., Suite 3900, Las Vegas, NV 89101; phone 702-486-3132; email BCPINFO@ag.state.nv.us.
Vermont residents	As a resident of Vermont, we will automatically limit sharing of your information outside of the Savvy Labs corporate family, unless otherwise permitted by law. We may share information with your consent to service your accounts or under joint marketing agreements.