

## PRIVACY POLICY

### FACTS

#### What does Intentional, LLC do with your personal information?

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##### 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.

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##### 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 date of birth
- Account balances and transaction history
- Investment experience and objectives
- Income and net worth

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##### How?

All investment advisers need to share clients' personal information to run their everyday business. In the section below, we list the reasons we may share your personal information; the reasons Intentional, LLC chooses to share; and whether you can limit this sharing.

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#### Reasons we can share your personal information | Does Intentional, LLC share? | Can you limit this sharing?

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For our everyday business purposes — such as to process transactions, maintain your account(s), respond to court orders and legal investigations, and comply with applicable laws | **Yes** | **No**

For our marketing purposes — to offer our advisory services to you | **Yes** | **No**

For joint marketing with other financial companies | **No** | We do not share

For our affiliates' everyday business purposes | **Yes** | **No**

For our affiliates to market to you | **No** | We do not share

For non-affiliates to market to you | **No** | We do not share

*Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.*

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## Who we are

### Who is providing this notice?

Intentional, LLC, a registered investment adviser.

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## What we do

### How does Intentional, LLC protect my personal information?

We maintain physical, electronic, and procedural safeguards designed to protect your personal information. These measures include secure systems, restricted access to data, and ongoing monitoring of service providers.

### How does Intentional, LLC collect my personal information?

We collect your personal information, for example, when you:

- Open an account
- Provide investment or financial information
- Enter into an advisory agreement

### Why can't I limit all sharing?

Federal law gives you the right to limit only certain types of sharing. Limitations do not apply to sharing necessary for everyday business purposes, compliance with legal obligations, or servicing your account.

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## Additional Information

We may share your personal information with **Raymond James**, our qualified custodian, as well as with other service providers (such as technology vendors, accountants, or compliance consultants) **solely as necessary to provide advisory services and operate our business**. These parties are required to maintain the confidentiality of your information and use it only for authorized purposes.

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## TEXT MESSAGING AND ELECTRONIC COMMUNICATION

We may communicate with clients and prospective clients through electronic means, including email, secure portals, and text messaging (SMS), when appropriate and permitted by applicable law.

Text messaging is used primarily for administrative, scheduling, and logistical communications. We do not recommend transmitting sensitive personal information, confidential financial data, or account-specific instructions via text message.

While we take reasonable measures to protect the security and confidentiality of electronic communications, text messages may not be secure and may be subject to interception, loss, or unauthorized access. By consenting to receive text messages from us, you understand that text messaging may not be a secure form of communication.

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Clients may opt out of text messaging at any time by notifying us in writing or by replying "STOP" to a text message, where applicable. Opting out of text messaging will not affect your ability to receive services or communicate with us through other means.

We retain electronic communications, including text messages, in accordance with our regulatory recordkeeping obligations.

## **Definitions**

### **Affiliates**

Companies related by common ownership or control. Intentional, LLC does not share personal information with affiliates.

### **Non-affiliates**

Companies not related by common ownership or control. Non-affiliates may include custodians or service providers. Intentional, LLC does not share personal information with non-affiliates for marketing purposes.

### **Joint marketing**

A formal agreement between non-affiliated financial companies to market financial products or services to you. Intentional, LLC does not participate in joint marketing arrangements.

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