Privileged and confidential

Draft

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FACTS	WHAT DOES ASK DOLLY, LLC DO WITH YOUR PERSONAL INFORMATION?
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; • Income; • Account balances • Transaction history; • Investment experience; and • Checking account information.
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 Ask Dolly chooses to share, and whether you can limit this sharing.

Reasons we can share your personal information	Does Ask Dolly 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, or report to credit bureaus	Yes	No
For our marketing purposes– to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	We don't share
For our affiliates' everyday business purposes— information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes— information about your creditworthiness	Yes	Yes
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	Yes	Yes

To limit our sharing	• Visit us online: www.askdolly.com *Please note*: If you are a *new* customer, we can begin sharing your information 30 days from the date we sent this notice. When you are *no longer* our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.

Questions?	▪ Go to www.askdolly.com

Who we are	
Who is providing this notice?	Ask Dolly, LLC
What we do	
How does Ask Dolly protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. For example, we use encryption in transit and at rest, access controls, and logging and monitoring.
How does Ask Dolly collect my personal information?	We collect your personal information, for example, when you: • seek financial or tax advice; • open an account; • seek advice about your investments; • give us your income information; • provide account information. 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 laws.
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. *Our affiliates include nonfinancial companies, such as YourRichBFF.*
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. • *Nonaffiliates we share with can include service providers (such as hosting, information technology, marketing, analytics, and artificial intelligence providers), certified financial professionals (CFPs) who respond to your questions through the Services, affiliate-link and referral partners, professional advisors, authorities and others, and business transferees.*

Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. • *Ask Dolly doesn't jointly market.*
Other important information	**California residents:** We will not share your personal information with nonaffiliates, except as permitted by law, such as with your consent or to provide the service. We will not share your personal information with affiliates (if any) if you instruct us not to do so. To limit our sharing with affiliates, please email us at hello@askdolly.com. **Vermont residents:** We will not disclose information about your creditworthiness to our affiliates (if any) and will not disclose your personal information, financial information, credit report, or health information to nonaffiliated third parties to market to you, other than as permitted by Vermont law, unless you authorize us to make those disclosures. Additional information concerning our privacy policies can be found at www.askdolly.com. **Nevada residents:** If you prefer not to receive marketing calls from us, you may be placed on our internal Do Not Call List by contacting us at hello@askdolly.com. To obtain more information about Nevada's law regarding telephone solicitations, you may also contact the Nevada Attorney General's office: Bureau of Consumer Protection, Office of the Nevada Attorney General, 555 E. Washington St., Suite 3900, Las Vegas, NV 89101; telephone number: 1-702-486-3132; email AgInfo@ag.nv.gov.