

Privacy Policy

Cresset Asset Management, LLC an investment advisor registered with the U.S. Securities and Exchange Commission, along with its subsidiaries, Cresset Wealth Advisors, LLC and Cresset Family Office, LLC, hereinafter collectively referred to as (“Cresset”) does not rent, sell or trade your personal information to anyone. This Privacy Policy describes how Cresset collects, uses, and shares your personal information (“Information”) when you contact us. Any visitor of the Cresset website (the “Website”) shall be considered a “User.”

COLLECTING INFORMATION

Cresset may record non-identifiable information about your use of the Website, including information about browsing activity, data reviewed, and other information related to your use of the Website. Cresset may use cookies or other tracking technology to record this and similar information about your activity on the Website. If you do not accept the terms of this Privacy Policy, you are not an authorized user of this Website and Cresset may choose not to do business with you or provide you services.

USE OF INFORMATION

Cresset stores, processes and maintains Information and data related to you in order to provide you support, offer you services, and disclose information in accordance with regulatory rules from the SEC, FINRA or any other regulatory agencies.

Cresset may use “cookies” or similar files or scripts throughout the Website to enhance your convenience in using the Website, to improve search functionality or to hold information that you would otherwise need to re-key. “Cookies” are text files collected by a user’s web browser. If you do not wish to accept “cookies” from the Website, you may configure your web browser so that it does not accept “cookies”; however, you may lose certain functions available on the Website.

INFORMATION AND THIRD PARTIES

Cresset will never rent, sell or trade your Information with any third parties except as required by law. This includes circumstances where we reasonably believe it is necessary or appropriate to investigate, prevent or react to illegal activities, suspected fraud, threatening situations, or violations of our terms and conditions of use. In the event we retain a third party to provide certain services to our Site, we may provide limited Information to that third party. All Information provided will be subject both to our Terms of Use, this Privacy Policy, and any similar policies set forth by such third party. We will only use reputable vendors and service providers in such circumstances whose privacy and security features are at least as rigorous as our own. Except as required by law or court/arbitrator order, Cresset will maintain your Information in strict confidence.

USER OPTIONS

You may request that we delete any Information by contacting us in writing at info@cressetwealth.com. We will ask you to verify your identity and will attempt to make any deletion request effective as soon as is commercially possible. We may retain Information connected to your account in accordance with applicable laws. You may decline to provide certain Information to Cresset, but such declination may disqualify you from using the Website.

You may set your browser (if supported) to opt-out from online behavioral tracking by enabling Do Not Track (“DNT”). Cresset does not track its customers over time and across third-party websites to provide targeted advertising and therefore Cresset does not respond to DNT signals.

SECURITY

Cresset takes reasonable steps to protect your Information from loss, misuse and unauthorized access, alteration, disclosure or destruction in accordance with applicable law. No Internet, e-mail or electronic operating system is ever fully secure or error free, so please take care in deciding what information you give to us.

Cresset takes steps to reasonably ensure that the privacy of your non-public information remains secure even in the event of the disposal of information that is no longer required to be maintained. Such steps shall include whenever possible, shredding paper documents and records prior to disposal, requiring off-site storage vendors to shred documents maintained in such locations prior to disposal, and erasing and/or obliterating any data contained on electronic media in such a manner that the information can no longer be read or reconstructed.

PHISHING SCAMS

Cresset does not send emails to users or customers requesting billing, login, user ID or password information. If you receive an email purporting to be from Cresset that asks you to provide personal or account information, or login and passwords, do not provide such information unless you have first verified that the website or email is from Cresset. Such emails may be fraudulent and used in connection with scams known as phishing. Cresset asks that you report any suspicious emails or websites to Cresset.

THIRD PARTY WEBSITES

This Privacy Policy and any related terms apply only to this Website and the services provided by Cresset. We may provide links to access other websites that are not operated or controlled by Cresset. These policies herein do not apply to any third-party websites.

CHANGES

We may alter this Privacy Policy from time to time. If we do, we will post an updated Privacy Policy to the Website with the effective date of the new policy. Each User is responsible for regularly reviewing this Privacy Policy for any changes. Your continued use of this Website or use of Cresset 's services constitutes consent to all such changes.

YOUR ROLE

Your participation is an important component of all our safety efforts. We believe it is essential that we work in close cooperation with you as our client to maintain the highest levels of security. Below are some helpful websites to learn ways to help protect your information.

- **Federal Trade Commission – ID Theft** (<https://www.consumer.ftc.gov/topics/identity-theft>)
- **Federal Trade Commission – Phishing** (<https://www.consumer.ftc.gov/articles/0003-phishing>)
- **Federal Trade Commission – Statement of Rights** (<https://www.identitytheft.gov/Know-Your-Rights>)
- **Identity Theft Resource Center** (<http://www.idtheftcenter.org>)
- **Social Security Administration** (<http://www.oig.ssa.gov/report-fraud-waste-or-abuse/what-cant-oig-investigate/identity-theft>)
- **Federal Deposit Insurance Corporation (FDIC)** (<https://www.fdic.gov>)
- **Justice Department** (www.justice.gov/criminal/fraud/websites/idtheft.html)
- **Postal Inspection Service** (<https://postalinspectors.uspis.gov>)

CONTACT

We will always provide contact information on our Site. Please contact us at info@cressetwealth.com at any time with any questions about this Privacy Policy or the related terms herein.

EFFECTIVE DATE

This Privacy Policy is effective as of September 20, 2018.