

WEBSITE PRIVACY POLICY

Effective Date: June 8, 2026

OVERVIEW

This Privacy Policy describes how we collect, use, and protect information when you visit and interact with our website (the "Services"). Specifically, this Privacy Policy covers:

- Information we receive from you when you interact with the Services
- How we use and process the information we receive
- If and why information may be disclosed to third parties
- Your choices regarding the collection and processing of your information

Please note that this Privacy Policy does not apply to information collected through third-party websites or services that you may access through links on our website.

PLEASE REVIEW THIS PRIVACY POLICY CAREFULLY. By using the Services, you accept the terms of this Privacy Policy and consent to our collection, use, disclosure, and retention of your information as described herein.

IF YOU DO NOT AGREE WITH ANY PART OF THIS PRIVACY POLICY, PLEASE DO NOT USE OUR WEBSITE.

We may update this Privacy Policy from time to time. The Effective Date at the top of this page reflects the most recent revision. We will use reasonable efforts to provide advance notice of material changes. Your continued use of the Services after the Effective Date constitutes acceptance of the updated Privacy Policy.

INFORMATION WE COLLECT

We collect limited information in connection with your use of our website. The types of information we may collect include:

Usage Data

When you visit our website, we automatically collect certain technical and navigational information, including:

- Your browser type and version
- Internet service provider and IP address
- Operating system and device type

- Pages visited and time spent on each page
- Referring URLs (the page you came from before visiting our site)
- Date and time of your visit
- General geographic location derived from your IP address

This Usage Data is collected automatically through GoDaddy's built-in analytics tools provided as part of our website hosting platform. Usage Data by itself generally does not identify you as an individual. However, it may be combined with other information in ways that could identify you, and some Usage Data may be considered Personal Information under applicable law.

Information You Voluntarily Provide

Our website is primarily informational. If you choose to contact us through any contact form, email link, or inquiry feature, you may provide us with information such as your name, email address, phone number, and the content of your inquiry. We only collect such information when you actively choose to provide it.

As a financial services website, we urge you to exercise caution before submitting any sensitive financial or personal information through any online form. If you do provide sensitive information, you consent to its use as described in this Privacy Policy.

HOW WE COLLECT INFORMATION

We collect information in the following ways:

Automatically — Cookies and Analytics Tools

Our website is hosted on GoDaddy.com. GoDaddy's platform automatically collects Usage Data through cookies and similar tracking technologies. A "cookie" is a small text file placed on your device that helps us understand how visitors interact with our website.

Cookies we use may include:

- Session cookies that expire when you close your browser
- Analytics cookies that help us understand site traffic and user behavior patterns

You can control cookies through your browser settings. Most browsers allow you to refuse or delete cookies. For more information about cookies and how to manage them, visit www.allaboutcookies.org. Please note that blocking cookies may limit some features of our website.

Directly From You

We collect information that you voluntarily submit to us, such as when you contact us through a contact form, email, or phone number listed on the site.

HOW WE USE YOUR INFORMATION

We may use the information we collect for the following purposes:

- To operate, maintain, and improve our website and the Services
- To understand how visitors use our website so we can enhance the user experience
- To respond to your inquiries, questions, or requests
- To detect and prevent fraud, security incidents, or other illegal activity
- To comply with applicable laws, regulations, and legal obligations
- To analyze site traffic and usage trends using aggregated, non-identifiable data

We do not sell your personal information. We do not use information collected through this website for automated decision-making or profiling in connection with financial product recommendations without your knowledge and consent through a separate, appropriate disclosure process.

HOW WE SHARE AND DISCLOSE YOUR INFORMATION

We do not sell or rent your personal information to third parties. We may share your information in the following limited circumstances:

With Service Providers

We share information with third-party service providers who assist us in operating our website and delivering the Services. Our primary hosting provider, GoDaddy.com, receives Usage Data as part of providing website hosting and analytics services. These providers are bound by their own privacy policies and applicable data protection laws. We require that they use your information only as necessary to perform services on our behalf.

For Legal Purposes

We may disclose your information as required by applicable law, regulation, or legal process, such as in response to a subpoena, court order, or government request. We may also share information to enforce our rights, protect our property, or protect the safety of others.

In Aggregated Form

We may share aggregated or anonymized data — which does not identify any individual — with third parties for research, analytics, or marketing purposes.

During Corporate Changes

If our firm undergoes a merger, acquisition, sale of assets, or other business transition, your information may be transferred as part of that transaction. We will use reasonable efforts to notify you before your information becomes subject to a different privacy policy.

INFORMATION STORAGE AND SECURITY

Our website is hosted by GoDaddy.com in the United States. Any information collected through the website is stored on GoDaddy's secure servers.

We and our hosting provider employ industry-standard security measures designed to protect information from unauthorized access, disclosure, alteration, or destruction. These measures include encryption, firewalls, and secure server infrastructure. However, no method of transmission or storage over the internet is completely secure. We cannot guarantee the absolute security of your information.

We retain information only as long as necessary for the purposes described in this Privacy Policy or as required by applicable law, including regulatory recordkeeping requirements applicable to financial advisors.

If you have any questions about the security of your information, please contact us using the information provided at the end of this Policy.

YOUR RIGHTS

Depending on your state of residence, you may have certain rights with respect to your personal information, including:

- **Right to Access:** Request access to the personal information we hold about you
- **Right to Correction:** Request correction of inaccurate or incomplete information
- **Right to Deletion:** Request deletion of your personal information, subject to certain legal exceptions
- **Right to Restrict Processing:** Request that we limit how we use your information
- **Right to Object:** Object to certain types of data processing

To exercise any of these rights, please contact us at the information provided below. We will respond to your request within a reasonable timeframe and in accordance with applicable law.

NOTICE TO CALIFORNIA RESIDENTS (CCPA)

If you are a California resident, the California Consumer Privacy Act (CCPA), as amended by the California Privacy Rights Act (CPRA), affords you specific rights regarding your personal information.

Categories of Personal Information We Collect

In the preceding 12 months, we may have collected the following categories of personal information from California residents who visited our website:

- Identifiers: Such as IP address and similar online identifiers collected automatically by our hosting platform
- Internet or Other Electronic Network Activity: Such as browsing behavior, pages visited, and interactions with our website

We do not knowingly collect the following categories from website visitors: Social Security numbers, financial account numbers, precise geolocation data, biometric information, health or medical information, or racial/ethnic origin.

How We Use California Residents' Personal Information

We use the personal information described above for the business purposes set forth in the "How We Use Your Information" section of this Policy.

Sharing of Personal Information

In the preceding 12 months, we have shared personal information with our hosting and analytics service provider (GoDaddy) for business purposes. We do not sell personal information, including the personal information of California residents.

Your CCPA Rights

As a California resident, you have the right to:

- Know what personal information we collect, use, disclose, or sell
- Delete personal information we have collected from you, subject to certain exceptions
- Correct inaccurate personal information
- Opt out of the sale or sharing of your personal information (note: we do not sell personal information)
- Non-discrimination for exercising your CCPA rights

To exercise your CCPA rights, please contact us using the information below. We will verify your identity before processing your request. You may also designate an authorized agent to submit a request on your behalf.

CHILDREN'S PRIVACY

Our website and Services are not directed to children under the age of 13. We do not knowingly collect personal information from children under 13. If we become aware that we have inadvertently collected personal information from a child under 13 without verifiable parental consent, we will take prompt steps to delete that information.

If you are under the age of majority in your jurisdiction, you may use our Services only with the consent of or under the supervision of a parent or legal guardian. In compliance with the Children's Online Privacy Protection Act (COPPA), if we learn that a child under 13 has contacted us, we will use that information only to respond to the child and inform them that our Services are not intended for them.

LINKS TO THIRD-PARTY WEBSITES

Our website may contain links to third-party websites or services that are not owned or controlled by us. This Privacy Policy applies only to our website. We have no control over and assume no responsibility for the content, privacy policies, or practices of any third-party websites.

A link to a third-party website does not constitute our endorsement of that site or its content. We encourage you to review the privacy policy of every website you visit before submitting any personal information.

CONTACT US

If you have any questions, concerns, or requests regarding this Privacy Policy or our privacy practices, please contact us at:

The LiveOak Group at Strategic Financial Partners

3500 Colonnade Pkwy

Birmingham, AL 35243

Phone: 205-439-8928

Email: Weston@liveoaksfp.com

We are committed to working with you to resolve any concerns about your privacy. If we are unable to address your concern to your satisfaction, you may have the right to lodge a complaint with the applicable state or federal regulatory authority.
