

Website Privacy Policy

Effective October 2026

This Website Privacy Policy explains how Invested Interests, LLC (the “Firm,” “we,” or “us”) handles information collected through our website, investedinterests.com (the “Site”). It applies to your use of the Site. If you become a client of the Firm, the personal financial information we collect and maintain as part of that advisory relationship is governed by our separate client Privacy Notice, which we provide when you become a client and each year after, not by this policy.

In short

- We do not sell or rent your personal information.
- We use the information you give us only to respond to you and to operate the Site.
- We use cookies and standard analytics to understand how the Site is used, and you can limit these through your browser.

1. Information we collect

We collect two kinds of information through the Site:

- Information you give us. When you complete a contact or inquiry form, email us, subscribe to updates, or apply to our internship or careers program, you may provide your name, email address, telephone number, and whatever you choose to include in your message.
- Information collected automatically. Like most websites, we automatically record basic technical information when you visit — your IP address, browser and device type, the pages you view, the site that referred you, and the date and time of your visit. We use cookies and similar technologies, including analytics tools such as Google Analytics and Google Tag Manager, to make the Site work and to measure how it is used.

2. How we use information

We use the information to respond to your questions and requests, to send updates you have asked for, to operate, secure, and improve the Site, and to meet our legal and recordkeeping obligations. We do not use it to make automated decisions about you, and we do not sell it.

3. How we share information — and what we don’t do

We do not sell or rent your information, and we do not share it with outside companies for their own marketing. We share it only:

- with service providers that help us run the Site and our business, such as our website host and analytics providers, who may use it only to perform those services for us;
- with your permission or at your direction;
- with the Firm’s own attorneys or accountants, who are bound to keep it confidential; and
- when the law requires or allows it — for example, a subpoena, a regulatory request, or to protect the Site, our clients, or others.

We may share aggregated or de-identified information — information that cannot reasonably be used to identify you — for analytics and reporting.

4. Cookies and your choices

Cookies are small files a website stores on your device. We use them to keep the Site working and to measure traffic. You can set your browser to refuse cookies or to alert you when one is sent, though some parts of the Site may not work as well if you do. You can opt out of Google Analytics using the browser add-on Google provides. Depending on where you live, you may have additional rights over your personal information, such as the right to request access to or deletion of it; contact us using the details below and we will respond as the law requires.

5. Links to other sites

The Site links to other websites, including our client login portal (Black Diamond), our custodian, and our social media pages. We do not control those sites and are not responsible for their privacy practices. Please review their policies before providing them with your information.

6. Children's privacy

The Site is intended for adults. We do not knowingly collect personal information from anyone under 18. If you believe a child has provided us information through the Site, please contact us and we will delete it.

7. How we protect information

We use reasonable physical, electronic, and procedural safeguards to protect information submitted through the Site. No website can be guaranteed completely secure, so please do not send sensitive personal or account information — such as Social Security numbers or account numbers — through the Site or by unencrypted email.

8. If you become a client

If you decide to become a client, the personal financial information the Firm collects and keeps as part of that relationship is covered by the Firm's separate client Privacy Notice, provided under the Gramm-Leach-Bliley Act and Minnesota law. That notice, not this Website Privacy Policy, governs how the Firm handles your nonpublic personal information as a client.

9. Changes to this policy

We may update this policy from time to time. When we do, we will post the updated version on the Site and revise the effective date above.

10. Contact us

Questions about this policy or how we handle information collected through the Site? Email us at info@investedinterests.com.

Adopted October 2026 by Invested Interests, LLC.