

FACTS	WHAT DOES EVERGREEN.AI 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: • Full legal name, date of birth and social security number • Information about your financial status • Account balance, assets and transaction history • Biometric Data When you are <i>no longer</i> 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.	
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 Evergreen chooses to share; and whether you can limit this sharing.	
Reasons we can share your personal information	Does Evergreen.AI 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	No	We don't share
For our affiliates to market to you	Yes	No
For nonaffiliates to market to you	No	We don't share
Questions?	Please contact clientservice@evergreen.ai	

Who we are	Evergreen.ai
What we do	
How does Evergreen protect my personal information?	We maintain physical, electronic, and procedural safeguards that comply with federal standards to protect your nonpublic personal information. Our Privacy Policy serves as a standard for all Evergreen employees for collection, use, retention, and security of individual customer information.
How does Evergreen collect my personal information?	We collect your personal information, for example, when you • Register as a user with Evergreen.ai • Provide account information, orally, and in writing • Give us your contact information • Link 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 law.
What happens when I limit sharing for an account I hold jointly with someone else?	If you have a joint account, each accountholder may make their own choice. Any accountholder's choice will apply only to that accountholder, unless you tell us otherwise.

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. <i>Evergreen Wealth Advisors. Evergreen Wealth Advisors is a wholly owned subsidiary of Evergreen Wealth Corporation ("EWC") and an SEC-registered Investment Adviser. Evergreen.ai is an AI-powered financial advice service offered by Evergreen Wealth Advisors, an SEC-registered investment adviser. Evergreen.ai is not itself a Registered Investment Adviser. Paid advisory services are provided only by Evergreen Wealth Advisors</i> <i>Evergreen Wealth Corporation. Evergreen Wealth Corporation is the parent company of Evergreen Wealth Advisors and the Evergreen.ai service.</i>
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <i>Evergreen does not share with nonaffiliates so they can market to you</i>
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <i>Evergreen doesn't jointly market</i>

Other important information

This Privacy Notice applies to information we collect and share in connection with your financial accounts and services, as required by federal law. Evergreen also maintains a separate, General Privacy Policy that explains how we handle information collected through our website, digital services, use of Artificial Intelligence, and marketing activities.

Evergreen.ai and Evergreen Wealth Advisors maintain separate but coordinated privacy notices. Together with Evergreen's General Privacy Policy (available in the Privacy section of our website), these documents explain how Evergreen entities collect, use, and share personal information. We will provide you with our Privacy Notice annually for as long as you maintain an ongoing relationship with us.

Evergreen.ai retains client information only as long as necessary to provide services or as required by law, after which it is securely deleted or anonymized.

Do Not Call Policy. This notice is the Evergreen Do Not Call Policy under the Telephone Consumer Protection Act. We do not solicit via telephone numbers listed on the state or federal Do Not Call lists, unless the law allows. Evergreen employees receive training on how to document and process telephone marketing choices. Consumers who ask not to receive telephone solicitations from Evergreen will be placed on the Evergreen Do Not Call list and will not be called in future campaigns, including those of Evergreen's affiliates.

Call Monitoring and Recording. If you communicate with us by telephone, we may monitor or record the call.
Opting Out. To limit our sharing: Call: (888) 884-0557 Email: clientservice@evergreen.ai Visit https://support.evergreen.ai/
California: Under California law, we will not share information we collect about you with companies outside of Evergreen, unless the law allows. For example, we may share information with your consent, to service your accounts, or to provide rewards or benefits you are entitled to. We will limit sharing among our companies to the extent required by California law. Under the California Consumer Privacy Act (CCPA), as amended by the California Privacy Rights Act (CPRA), you have the right to: • Request access to the personal information we collect about you; • Request deletion or correction of your personal information; • Opt out of the sale or sharing of your personal information; • Not be discriminated against for exercising your privacy rights. To exercise these rights, please contact us as set out in the "Opting Out" section above.
For Nevada residents only. We are providing you this notice under state law. You may be placed on our internal Do Not Call List by following the directions in the "Opting Out" section above. Nevada law requires we provide the following contact information: Bureau of Consumer Protection, Office of the Nevada Attorney General, 555 E. Washington St., Suite 3900, Las Vegas, NV 89101; Phone number: 702.486.3132; email: aginfo@ag.nv.gov; Evergreen, clientservice@evergreenwealth.com.
Vermont: Under Vermont law, we will not share non-public personal information we collect about Vermont residents with companies outside of our corporate family, unless the law allows. For example, we may share information with your consent, to service your accounts or under joint marketing agreements with other financial institutions with which we have joint marketing agreements. We will not share information about your creditworthiness within our corporate family except with your consent, but we may share information about our transactions or experiences with you within our corporate family without your consent.