

Combined Privacy Notice

Trek Financial, LLC and Prism Financial Concepts

Effective Date: September 1, 2026

Last Updated: September 1, 2026

Introduction

This Notice contains two privacy policies, presented in full, for two separate companies:

- Section A is the Privacy Notice of Trek Financial, LLC ("Trek"), an SEC-registered investment adviser, reproduced as issued by Trek. It governs client and customer nonpublic personal information maintained in Trek's systems.
- Section B is the Privacy Statement of Prism Financial Concepts ("Prism"), reproduced as prepared and approved for the Prism website. It governs website, marketing, and cookie/tracking data collected prior to any advisory relationship being established with Trek.

If you become a client of Trek Financial, LLC, your information is governed by Section A, Trek's Privacy Notice, without exception.

SECTION A, Trek Financial Privacy Notice

FACTS

What Does Trek Financial ("Trek") Do With Your Personal Information?

The Law

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.

Our Policy

The types of personal information we collect, and share depend on the product or service you have with us. This information can include:

- Income
- Employment and residential information
- Social security number
- Cash balance
- Security balances
- Transaction detail history
- Investment objectives, goals, and risk tolerance

When you are no longer our customer, we continue to share your information as described in this notice.

Your Rights

All financial companies need to share customers' personal information to run their everyday business. We list below the reasons financial companies can share their customers' personal information; the reasons Trek chooses to share; and whether you can limit this sharing.

Definitions

Term	Definition
Everyday Business Purposes	The actions necessary by financial companies to run their business and manage customer accounts, such as providing investment advisory and financial planning advice, processing securities transactions, and otherwise providing financial services to you.
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. Trek has no affiliates.

Non-Affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. Trek does not share information with non-affiliates for marketing purposes.
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. Trek does not engage in joint marketing with non-affiliates.

Reasons we can share your personal information	Does Trek share?	Can you limit this sharing?
For our everyday business purposes, such as to provide advice, process your transactions, and maintain your account(s)	Yes	No
For our marketing purposes, to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	N/A
For our affiliates' everyday business purposes, information about your transactions and experiences	No	N/A
For our affiliates' everyday business purposes, information about your creditworthiness	No	N/A
For our affiliates to market to you	No	N/A
For non-affiliates to market to you	No	N/A

Contact Us: Call Trek at 480-483-1510

Sharing Practices

Question	Answer
How often does Trek notify me about their practices?	We must notify you about our sharing practices when you open an account and each year while you are a customer.

How does Trek protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does Trek collect my personal information?	We collect your personal information, for example, when you establish an investment advisory relationship, contract for financial planning services, open an account or deposit money with custodians, or purchase or sell securities with executing broker-dealers. We also collect your personal information from others, such as custodians, broker-dealers, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit sharing only for affiliates' everyday business purposes, information about your creditworthiness; affiliates to market to you; and non-affiliates to market to you. State laws and individual companies may give you additional rights to limit sharing.

If you would like a copy of the Trek Financial Form ADV Part 2A and 2B, please send a written request to:

Trek Financial
8355 E Hartford Dr, Suite 105
Scottsdale, AZ 85255

If you wish to modify or impose reasonable restrictions concerning the management of your account, or if your financial situation, investment objectives, or risk tolerance have changed, please contact your Trek Financial investment advisor representative or contact Trek Compliance at 480-483-1510. We will contact you at least annually to determine if your investment goals, objectives, and risk tolerance have changed.

We urge that you advise us immediately if you have not received your custodian or brokerage statement, which is required to be delivered to you no less frequently than quarterly. In addition, please compare any account information provided by us with account statements from your broker-dealer or custodian and to advise us of any discrepancies. The official record of your account is maintained by your broker-dealer or custodian.

SECTION B, Prism Financial Concepts Privacy Statement

This privacy statement was last changed on August 20, 2026, last checked on August 20, 2026, and applies to citizens and legal permanent residents of the United States. In this privacy statement, we explain what we do with the data we obtain about you via <https://prismfc.com>. We recommend you carefully read this statement.

In our processing we comply with the requirements of privacy legislation. That means, among other things, that:

- we clearly state the purposes for which we process personal data. We do this by means of this privacy statement;
- we aim to limit our collection of personal data to only the personal data required for legitimate purposes;
- we first request your explicit consent to process your personal data in cases requiring your consent;
- we take appropriate security measures to protect your personal data and also require this from parties that process personal data on our behalf; and
- we respect your right to access your personal data or have it corrected or deleted, at your request.

If you have any questions, or want to know exactly what data we keep of you, please contact us.

1. Purpose and categories of data

We may collect or receive personal information for a number of purposes connected with our business operations, which may include the following:

1.1 Contact, through phone, mail, email and/or webforms

The following categories of data are collected:

- A first and last name
- An email address
- A home or other physical address, including street name and name of a city or town
- A telephone number
- Account name or alias
- IP Address
- Internet activity information, including, but not limited to, browsing history, search history, and information regarding a consumer's interaction with an Internet Web site, application, or advertisement
- Geolocation data
- Professional or employment-related information

NOTE: In Data Collected sections, Account Name refers to a Business entity, not a financial account.

Retention period: We determine the retention period according to fixed objective criteria. The primary Google cookie and the property specific cookie expire after 2 years. HubSpot Cookie lifespan expires after 6 months.

1.2 Newsletters

- A first and last name
- An email address
- Geolocation data
- Account name or alias
- IP Address
- A telephone number
- Internet activity information, including, but not limited to, browsing history, search history, and information regarding a consumer's interaction with an Internet Web site, application, or advertisement
- Professional or employment-related information
- Social Media accounts

Retention period: We determine the retention period according to fixed objective criteria. The primary Google cookie and the property specific cookie expire after 2 years. HubSpot Cookie lifespan expires after 6 months.

1.3 To support services or products that a customer wants to buy or has purchased

- A first and last name
- Account name or alias
- A home or other physical address, including street name and name of a city or town
- An email address
- A telephone number
- IP Address
- Internet activity information, including, but not limited to, browsing history, search history, and information regarding a consumer's interaction with an Internet Web site, application, or advertisement
- Geolocation data
- Social Media accounts
- Professional or employment-related information

Retention period: We determine the retention period according to fixed objective criteria. The primary Google cookie and the property specific cookie expire after 2 years. HubSpot Cookie lifespan expires after 6 months.

1.4 To be able to comply with legal obligations

- A first and last name

- Account name or alias
- A home or other physical address, including street name and name of a city or town
- An email address
- A telephone number
- IP Address
- Internet activity information, including, but not limited to, browsing history, search history, and information regarding a consumer's interaction with an Internet Web site, application, or advertisement
- Geolocation data
- Social Media accounts
- Professional or employment-related information

Retention period: We determine the retention period according to fixed objective criteria. The primary Google cookie and the property specific cookie expire after 2 years. HubSpot Cookie lifespan expires after 6 months.

1.5 Compiling and analyzing statistics for website improvement

- IP Address
- Internet activity information, including, but not limited to, browsing history, search history, and information regarding a consumer's interaction with an Internet Web site, application, or advertisement
- Geolocation data
- A first and last name
- Account name or alias
- A home or other physical address, including street name and name of a city or town
- An email address
- A telephone number
- Social Media accounts
- Professional or employment-related information

Retention period: We determine the retention period according to fixed objective criteria. The primary Google cookie and the property specific cookie expire after 2 years. HubSpot Cookie lifespan expires after 6 months.

1.6 To be able to offer personalized products and services

- A first and last name
- An email address
- Internet activity information, including, but not limited to, browsing history, search history, and information regarding a consumer's interaction with an Internet Web site, application, or advertisement
- Geolocation data

- IP Address

Retention period: We determine the retention period according to fixed objective criteria. The primary Google cookie and the property specific cookie expire after 2 years. HubSpot Cookie lifespan expires after 6 months.

1.7 To sell or share data with a third party

- A first and last name
- Account name or alias
- A home or other physical address, including street name and name of a city or town
- An email address
- A telephone number
- IP Address
- Internet activity information, including, but not limited to, browsing history, search history, and information regarding a consumer's interaction with an Internet Web site, application, or advertisement
- Geolocation data
- Employment history
- Social Media accounts

Retention period: We determine the retention period according to fixed objective criteria. The primary Google cookie and the property specific cookie expire after 2 years. HubSpot Cookie lifespan expires after 6 months.

2. Disclosure practices

We disclose personal information if we are required by law or by a court order, in response to a law enforcement agency, to the extent permitted under other provisions of law, to provide information, or for an investigation on a matter related to public safety. If our website or organization is taken over, sold, or involved in a merger or acquisition, your details may be disclosed to our advisers and any prospective purchasers and will be passed on to the new owners.

3. How we respond to Do Not Track signals / Global Privacy Control

Our website responds to and supports the Do Not Track (DNT) header request field. If you turn DNT on in your browser, those preferences are communicated to us in the HTTP request header, and we will not track your browsing behavior.

4. Cookies

Our website uses cookies. For more information about cookies, please refer to our Cookie Policy on our Cookie Policy (US) webpage.

5. Security

We are committed to the security of personal data. We take appropriate security measures to limit abuse of and unauthorized access to personal data. This ensures that only the necessary persons have access to your data, that access to the data is protected, and that our security measures are regularly reviewed.

6. Third-party websites

This privacy statement does not apply to third-party websites connected by links on our website. We cannot guarantee that these third parties handle your personal data in a reliable or secure manner. We recommend you read the privacy statements of these websites prior to making use of these websites.

7. Amendments to this privacy statement

We reserve the right to make amendments to this privacy statement. It is recommended that you consult this privacy statement regularly in order to be aware of any changes. In addition, we will actively inform you wherever possible.

8. Accessing and modifying your data

If you have any questions or want to know which personal data we have about you, please contact us. Please make sure to always clearly state who you are, so that we can be certain that we do not modify or delete any data of the wrong person. We shall provide the requested information only upon receipt of a verifiable consumer request. You can contact us by using the information below.

You have the following rights

8.1 You have the following rights with respect to your personal data:

- 1. You may submit a request for access to the data we process about you.
- 2. You may object to the processing.
- 3. You may request an overview, in a commonly used format, of the data we process about you.
- 4. You may request correction or deletion of the data if it is incorrect or not or no longer relevant, or to ask to restrict the processing of the data.
- 5. You may appeal our decision whenever we refuse to take action on a request and submit a complaint with the competent authority if your appeal is denied.

8.2 Supplements

This section, which supplements the rest of this Privacy Statement, applies to citizens and legal permanent residents of California (CPRA), Oregon (OCPA), Texas (TDPSA), Virginia (CDPA), Tennessee (TIPA), Utah (UCPA), Rhode Island (DTPPA), New Jersey (DPL), New Hampshire (DPA), Nevada (NRS 603A), Nebraska (DPA), Montana (MCDPA), Minnesota (MCDPA), Maryland (MODPA), Kentucky (KCDPA), Iowa (CDPA), Indiana (ICDPA), Delaware (PDPA), Connecticut (CTDPA) and Colorado (CPA).

California

Right to know what personal information is being collected about you: A consumer shall have the right to request that a business that collects personal information about the consumer disclose to the consumer the following: (1) The categories of personal information it has collected about that consumer. (2) The categories of sources from which the personal information is collected. (3) The business or commercial purpose for collecting or selling personal information. (4) The categories of third parties with whom the business shares personal information. (5) The specific pieces of personal information it has collected about that consumer.

The right to know whether personal information is sold or disclosed and to whom: A consumer shall have the right to request that a business that sells the consumer's personal information, or that discloses it for a business purpose, disclose to that consumer: (1) The categories of personal information that the business collected about the consumer. (2) The categories of personal information that the business sold about the consumer and the categories of third parties to whom the personal information was sold, by category or categories of personal information for each third party to whom the personal information was sold. (3) The categories of personal information that the business disclosed about the consumer for a business purpose.

The Right to equal service and price, even if you exercise your privacy rights: A consumer shall have the right to request that a business delete any personal information about the consumer which the business has collected from the consumer. A business that receives a verifiable request from a consumer to delete the consumer's personal information shall delete the consumer's personal information from its records and direct any service providers to delete the consumer's personal information from their records. A business or a service provider shall not be required to comply with a consumer's request to delete the consumer's personal information if it is necessary for the business or service provider to maintain the consumer's personal information in order to: (1) Complete the transaction for which the personal information was collected, provide a good or service requested by the consumer, or reasonably anticipated within the context of a business's ongoing business relationship with the consumer, or otherwise perform a contract between the business and the consumer. (2) Detect security incidents, protect against malicious, deceptive, fraudulent, or illegal activity or prosecute those responsible for that activity. (3) Debug to identify and repair errors that impair existing intended functionality. (4) Exercise free speech, ensure the right of another consumer to exercise his or her right of free speech, or exercise another right provided for by law. (5) Comply with the California Electronic Communications Privacy Act. (6) Engage in public or peer-reviewed scientific, historical, or statistical research in the public interest that adheres to all other applicable ethics and privacy laws, when the business's deletion of the information is likely to render impossible or seriously impair the achievement of such research, if the consumer has provided informed consent. (7) Exercise free speech, ensure the right of another consumer to exercise his or her right of free speech, or exercise another right provided for by law. (8) To enable solely internal uses that are reasonably aligned with the expectations of the consumer based on the consumer's relationship with the business. (9) Comply with a legal obligation. (10) Otherwise use the consumer's personal information, internally, in a lawful manner that is compatible with the context in which the consumer provided the information.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

Financial incentives / Selling of personal data to third parties: We have not sold consumers' personal data in the preceding 12 months, across the following categories: Internet activity information; a first and last name; account name or alias; a home or other physical address; an email address; a telephone number; IP Address; geolocation data; social media accounts; professional or employment-related information.

We have not disclosed consumers' personal information for a business purpose in the preceding 12 months, across the following categories: Internet activity information; a first and last name; account name or alias; a home or other physical address; an email address; a telephone number; IP Address; geolocation data; social media accounts; professional or employment-related information.

Colorado

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the data to another entity without hindrance. You may exercise this right no more than two times per calendar year.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under Colorado law this concerns the following purposes: (1) targeted advertising; (2) the sale of personal data; or (3) profiling in furtherance of decisions that produce legal or similarly significant effects concerning a consumer. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

Connecticut

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the data to another entity without hindrance. We are not required to reveal any trade secret.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the CTDPA this concerns the following purposes: (1) targeted advertising; (2) the sale of personal data; or (3) profiling in furtherance of decisions that produce legal or similarly significant effects concerning a consumer. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

Delaware

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically feasible, readily usable format that allows

you to transmit the data to another entity without hindrance. You may exercise this right for free no more than once per calendar year.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the PDPA this concerns the following purposes: (1) targeted advertising; (2) the sale of personal data; or (3) profiling in furtherance of decisions that produce legal or similarly significant effects concerning a consumer. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page. **Right to obtain a list of third parties to whom the controller has disclosed the consumer's personal data.**

Indiana

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the data to another entity without hindrance. You may exercise this right no more than two times per calendar year.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the ICDPA this concerns the following purposes: (1) targeted advertising; (2) the sale of personal data; (3) profiling in furtherance of decisions that produce legal or similarly significant effects concerning a consumer; or (4) the processing of sensitive data. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

Iowa

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically practicable, readily usable format that allows you to transmit the data to another entity without hindrance. You may exercise this right for free no more than two times per calendar year.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the CDPA this concerns the following purposes: (1) targeted advertising; (2) the sale of personal data; or (3) the processing of sensitive data. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

Kentucky

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the data to another entity without hindrance. You may exercise this right no more than two times per calendar year.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the KCDPA this concerns the following purposes: (1) targeted

advertising; (2) the sale of personal data; (3) profiling in furtherance of decisions that produce legal or similarly significant effects concerning a consumer; or (4) the processing of sensitive data. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

Maryland

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the data to another entity without hindrance. You may exercise this right no more than two times per calendar year.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the MODPA this concerns the following purposes: (1) targeted advertising; (2) the sale of personal data; (3) profiling in furtherance of decisions that produce legal or similarly significant effects concerning a consumer; or (4) the processing of sensitive data. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

Minnesota

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the data to another entity without hindrance. You may exercise this right no more than two times per calendar year.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the MCDPA this concerns the following purposes: (1) targeted advertising; (2) the sale of personal data; (3) profiling in furtherance of decisions that produce legal or similarly significant effects concerning a consumer; or (4) the processing of sensitive data. You have the following specific rights related to profiling: the right to challenge the outcome of the profiling; the right to be informed, where feasible, of the reasons behind the decision resulting from the profiling; the right to know what actions you could have taken to obtain a different outcome, and what actions you can take in the future to do so; the right to review the personal data used in the profiling process; and the right to have any inaccurate data corrected and the profiling decision reassessed based on the updated information. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

Montana

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the data to another entity without hindrance. We are not required to reveal any trade secret.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the MCDPA this concerns the following purposes: (1) targeted advertising; or (2) the sale of personal data; or (3) profiling in furtherance of decisions that produce legal or similarly significant effects concerning a consumer. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

Nebraska

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the data to another entity without hindrance. You may exercise this right for free no more than two times per calendar year.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the DPA this concerns the following purposes: (1) targeted advertising; (2) the sale of personal data; or (3) profiling in furtherance of decisions that produce legal or similarly significant effects concerning a consumer. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

Nevada

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the Nevada Privacy Law, this concerns the sale of personal data. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

New Hampshire

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the data to another entity without hindrance. You may exercise this right for free no more than once per calendar year.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the DPA this concerns the following purposes: (1) targeted advertising; or (2) the sale of personal data; or (3) profiling in furtherance of solely automated decisions that produce legal or similarly significant effects concerning a consumer. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

New Jersey

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the data to another entity without hindrance. You may exercise this right for free no more than once per calendar year.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the DPL this concerns the following purposes: (1) targeted advertising; or (2) the sale of personal data; or (3) profiling in furtherance of decisions that produce legal or similarly significant effects concerning a consumer. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

Oregon

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the data to another entity without hindrance. We are not required to reveal any trade secret.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the OCPA this concerns the following purposes: (1) targeted advertising; or (2) the sale of personal data; or (3) profiling in furtherance of decisions that produce legal or similarly significant effects concerning a consumer. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

Rhode Island

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the data to another entity without hindrance. You may exercise this right no more than two times per calendar year.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the DTPPA this concerns the following purposes: (1) targeted advertising; (2) the sale of personal data; (3) profiling in furtherance of decisions that produce legal or similarly significant effects concerning a consumer; or (4) the processing of sensitive data. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

Tennessee

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the data to another entity without hindrance. You may exercise this right no more than two times per calendar year.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the TIPA this concerns the following purposes: (1) targeted advertising; (2) the sale of personal data; (3) profiling in furtherance of decisions that produce legal or similarly significant effects concerning a consumer; or (4) the processing of sensitive data. For more

information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

Texas

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the data to another entity without hindrance. We are not required to reveal any trade secret.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the TDPSA this concerns the following purposes: (1) targeted advertising; or (2) the sale of personal data; or (3) profiling in furtherance of decisions that produce legal or similarly significant effects concerning a consumer. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

Utah

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data that you previously provided to us as a controller in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the data to another entity without hindrance.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the UCPA this concerns the following purposes: (1) targeted advertising; or (2) the sale of personal data. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

Virginia

Right to Data Portability: When exercising the right to Access personal data, you have the right to obtain the personal data in a portable and, to the extent technically feasible, readily usable format that allows you to transmit the data to another entity without hindrance. You may exercise this right no more than two times per calendar year.

Right to opt-out: You may submit a request directing us not to make certain disclosures of personal information we maintain about you. Under the CDPA this concerns the following purposes: (1) targeted advertising; (2) the sale of personal data; or (3) profiling in furtherance of decisions that produce legal or similarly significant effects concerning a consumer. For more information about the possibility of submitting an opt-out request, please refer to our Opt-out preferences page.

9. Children

Our website is not designed to attract children and it is not our intent to collect personal data from children under the age of consent in their country of residence. We therefore request that children under the age of consent do not submit any personal data to us.

10. Contact details

Prism Financial Concepts
8355 E Hartford Dr Ste 105
Scottsdale, AZ 85255
United States
Website: <https://prismfc.com>
Email: info@prismfc.com
Phone number: 480-661-1236

11. Data Requests

For the most frequently submitted requests, we also offer you the possibility to use our data request form. You may: submit a request for access to the data we process about you; submit a request for deletion of the data if it is no longer relevant; submit a request to receive an export file of the data we process about you.

Note: If you become a client of Trek Financial, LLC, your information is thereafter governed by Section A, Trek's Privacy Notice, without exception.