

## Savant Wealth Management Privacy Notice

The Securities and Exchange Commission (SEC) was required by the Gramm-Leach-Bliley Act (“GLBA”) to establish standards to safeguard client information and records. As a result, the SEC adopted Regulation S-P, which, among other things, requires investment advisors registered with the SEC to adopt appropriate policies and procedures that address safeguards to protect this information and to disclose its privacy policies to clients. Savant Wealth Management and its affiliates (collectively “we”, “us”, or “Savant”) has always taken great measures to protect and safeguard information we gather on our clients. As a financial company, we can choose if or how we 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. This Privacy Notice (“Notice”) describes the ways Savant may collect, store, use, disclose, and protect your personal information. We use the term “personal information” to describe information that can be associated with you and can be used to identify you. Personal information does not include (i) publicly available information from government records, (ii) de-identified or aggregated consumer information, and (iii) information excluded from the scope of California Consumer Privacy Act of 2018 (“CCPA”).

### Affiliations

Savant Capital, LLC is the sole member of Savant GPS, LLC dba Savant Tax & Consulting. Savant is affiliated with Savant Legal LLP, a law firm that provides estate planning document preparation and other legal services.

### Types of Information Collected

We collect information that identifies, relates to, describes, references, is capable of being associated with, or could reasonably be linked, directly or indirectly, with a particular consumer or device (“personal information”). In particular, we have collected the following categories of personal information from consumers within the last twelve (12) months:

Category	Examples
Identifiers	A real name, alias, postal address, unique personal identifier, online identifier, Internet Protocol address, email address, account name, Social Security number, driver’s license number, passport number, or other similar identifiers.
Personal Information categories	A name, signature, Social Security number, physical characteristics or description, address, telephone number, passport number, driver’s license or state identification card number, insurance policy number, education, employment, employment history, bank account number, credit card number, debit card number, or any other financial information, medical information, or health insurance information. Some personal information included in this category may overlap with other categories.

Protected Classification Characteristics	Age (40 years or older), race, color, ancestry, national origin, citizenship, religion or creed, marital status, medical condition, physical or mental disability, sex (including gender, gender identity, gender expression, pregnancy or childbirth and related medical conditions), sexual orientation, veteran or military status, genetic information (including familial genetic information).
Internet or other similar network activity	Browsing history, search history, information on a consumer’s interaction with a website, application, or advertisement.
Professional or Employment related information	Current or past job history or performance evaluations.

We will not collect additional categories of personal information or use the personal information we collect for materially different, unrelated, or incompatible purposes without providing you notice.

We collect nonpublic personal information about you from the following sources:

- Information we receive from you on applications or other forms, such as your name, address, phone number, Social Security Number, date of birth, account numbers, tax documents, income, employment and residential information, cash balances, security balances, other investments, net worth, investment objectives, goals, and risk tolerance.
- Information about your transactions with us or with your custodian(s), such as buys, sells, gains, losses, fees, and/or holdings. Such information may be obtained from paper statements or via electronic download directly from your custodian.
- Information from third parties that interact with us in connection with the services we provide.
- Information collected directly and indirectly from activity on our website.

Savant’s web servers collect domain names and/or IP addresses of users to measure what pages and features are accessed by our visitors. This information helps us administer the site, improve content, and gather broad demographic information for aggregate use.

Savant also uses “cookies” or similar files or scripts throughout its website to enhance your convenience in using our websites, 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 our website, you may configure your web browser so that it does not accept “cookies”; however, you may lose certain functions available on our website.

Savant does not have actual knowledge that it sells or shares the personal information of consumers under 16 years of age. Savant does not use or disclose sensitive personal information for purposes other than those specified in Section 7027 of the CCPA.

### **SMS Communications and Mobile Data Use**

Savant Wealth Management may use mobile phone numbers provided by users to send informational or service-related text messages. By submitting your mobile number, you consent to receive SMS messages from us. Message and data rates may apply. You may opt out at any time by replying "STOP" to any message.

We do not sell mobile information to third parties or affiliates for marketing or promotional purposes. We may use mobile identifiers for internal business purposes, including digital advertising and audience matching with trusted advertising platforms. All text messaging originator opt-in data and consent will not be shared with any third parties for SMS-related marketing.

Our SMS campaigns are registered and compliant with carrier and Cellular Telecommunications Industry Association (CTIA) guidelines, including verified business identity and approved use case categorization.

### **Cookie Policy**

Savant uses "cookies" and other online tracking technologies, such as pixels, tags, or web beacons (collectively referred to in this policy as "cookies") to allow our website to store and retrieve information about visitors' online activity.

Cookies can be categorized by who places them:

- First-party cookies: These cookies are downloaded to an individual's computer from a server or domain managed by the publisher of the website whose service the individual is requesting.
- Third party cookies: These cookies are downloaded to a computer from a server or domain that is not managed by the publisher, but by another entity that may be seeking data obtained through cookies.

Cookies can also be categorized by their duration:

- Session cookies: These cookies are designed to collect and store data while the individual accesses a web page. They are often used to store information for the duration of a visit to the site (e.g., what account you are logged into). Once an individual leaves the website, the session cookie is deleted.
- Persistent cookies: These cookies store data on a computer for the duration of the period set within the cookie's file, which is determined by the entity controlling the cookie, and can range from a few minutes to several years, or until manually deleted.

Lastly, cookies can be categorized by the function they serve. Savant uses the following types of first- and third party cookies:

- Functionality cookies: These cookies allow the website to remember choices you make (such as your geographic region or preferred text size). Functionality cookies do not collect any personal information. Enabling functionality cookies may be necessary to access the full content of website material.
- Personalization cookies: Personalization cookies allow a website to remember information that changes the page's appearance or behavior, such as, for example, the language selected for viewing the page.

- Analytics cookies: Analytics cookies collect pseudonymized information to analyze how individuals browse a website and enable Savant to measure the number of visitors to its websites, as well as to measure and analyze how individuals interact with the site. We use this information to improve the websites and the products or services offered.
- Behavioral advertising cookies: Savant serves advertisements on various websites using third party companies. If an individual visits a website or clicks on one of Savant's advertisements, behavioral cookies will be placed on the individual's computer. Behavioral cookies allow Savant to manage and optimize its digital marketing (e.g., banner ads, pages offering informational brochures, email campaigns, etc.). Behavioral cookies may be used to build a profile to provide content more relevant to an individual's interests. They adapt advertising and the content the individual sees on other websites based on browsing habits, including how the individual navigates websites, as well as how the individual interacts with internet advertising.

### **Your Consent**

By continuing to use our website, you consent to the Firm's use of cookies in order to analyze the way you use our website. Please read this Cookie Policy carefully for more details about the information we collect when you use our website. If you do not wish to accept cookies in connection with your use of this website, you must stop using our website or withdraw your consent as stipulated below.

### **Withdraw Your Consent**

You may withdraw your consent at any time by adjusting your internet browser settings to delete all cookies. If you do this, however, you may have to manually adjust some of your internet browser preferences every time you visit a site, and some services and functionalities may not work.

### **How to Manage Cookies**

To learn more about behavioral advertising cookies and to opt in or out of multiple advertising networks at once, you can visit the website <https://youradchoices.com/>. Some advertising networks do not participate in the YourAdChoices service. To opt out of some of these networks, please visit the consumer opt-out page on the Network Advertising Initiative website <https://optout.networkadvertising.org/>.

As explained above, cookies help you to get the most out of the websites that make use of this technology. Disabling cookies may affect the functionality of many of the websites you visit. If you do disable cookies, performance and functionality will be affected.

If you wish to delete, disable, or re-enable cookies, you may do so through your browser as follows:

- Microsoft Edge: <https://support.microsoft.com/en-us/microsoft-edge/view-cookies-in-microsoft-edge-a7d95376-f2cd-8e4a-25dc-1de753474879>
- Chrome: <https://support.google.com/chrome/answer/95647?hl=en>
- Firefox: <https://support.mozilla.org/en-US/kb/cookies-information-websites-store-on-your-computer>

- Safari:  
<http://www.apple.com/au/support/mac-apps/safari/>
- All other browsers: Please look for a 'help' function in the browser, or contact the browser provider.

### **Do Not Track Policy**

Our website responds to “do not track” signals setting from users’ web browsers.

### **Use of Personal Information**

We do not sell your personal information to anyone. We do not share mobile opt-in with third parties for marketing purposes. We do not share your information for joint marketing with other financial companies or share information about your transactions and experiences or information about your creditworthiness for our affiliates’ everyday business purposes. We do not share your information so our affiliates or non-affiliates can market to you.

We do not disclose or share nonpublic personal information about you to third parties, unless you have specifically asked us to do so or one of the following limited exceptions applies:

Savant restricts access to your personal and account information to those employees who need to know that information in order to provide services to you. We maintain physical, electronic, and procedural safeguards to guard your nonpublic personal information.

### **Sharing Personal Information**

We may disclose your personal information to a third party for a business purpose. When we disclose personal information for a business purpose, we enter a contract that describes the purpose and requires the recipient to both keep that personal information confidential and not use it for any purpose except performing the contract.

In the preceding twelve (12) months, we have disclosed the following categories of personal information for a business purpose:

Category A: Identifiers.

Category B: California Customer Records personal information categories.

Category C: Protected classification characteristics under California or federal law.

We disclose your personal information for a business purpose to the following categories of third parties:

- Our affiliates.
- Service providers that have agreed to confidentiality restrictions and use any personal information they collect on our behalf solely for the purpose of providing the contracted service to us and as otherwise described herein in order to provide you with our services, e.g. custodians.
- Third parties to whom you or your agents authorize us to disclose your personal information in connection with products or services we provide to you.
- We may disclose or report personal information in limited circumstances where we believe in good faith that disclosure is required or permitted under law - for example, to cooperate with regulators or law enforcement authorities.

In the preceding twelve (12) months, we have not sold any personal information.

### **Right to Limit Sharing**

Federal law gives you the right to limit sharing only for:

- affiliates’ everyday business purposes—information about your creditworthiness (we do not share)
- affiliates to market to you (we do not share)
- non-affiliates to market to you (we do not share)

State laws and individual companies may give you additional rights to limit sharing.

### **Your Rights and Choices**

The CCPA provides consumers (California residents) with specific rights regarding their personal information. This section describes your CCPA rights and explains how to exercise those rights.

### **Access to Specific Information and Data Portability Rights**

You have the right to request that we disclose certain information to you about our collection and use of your personal information over the past 12 months. Once we receive and confirm your verifiable consumer request, we will disclose to you:

- The categories of personal information we collected about you.
- The categories of sources for the personal information we collected about you.
- Our business or commercial purpose for collecting or selling that personal information.
- The categories of third parties with whom we share that personal information.
- The specific pieces of personal information we collected about you (also called a data portability request).
- If we sold or disclosed your personal information for a business purpose, two separate lists disclosing:
  - sales, identifying the personal information categories that each category of recipient purchased; and
  - disclosures for a business purpose, identifying the personal information categories that each category of recipient obtained.

### **Right to Correct**

You have the right to request us to correct certain information that comes into our possession. We may deny your request to correct if your identity cannot be verified. A business may also deny a consumer’s request to correct if it determines that the contested personal information is more likely than not accurate based on the totality of the circumstances. A business that complies with a consumer’s request to correct shall correct the personal information at issue on its existing systems. The business shall also instruct all service providers and contractors that maintain the personal information at issue pursuant to their written contract with the business to make the necessary corrections in their respective systems.

Documentation:

- A business shall accept, review, and consider any documentation that the consumer provides in connection with their right to correct whether provided voluntarily or as required by the business. Consumers should make a good-faith effort to provide businesses

with all necessary information available at the time of the request.

- A business may require the consumer to provide documentation if necessary to rebut its own documentation that the personal information is accurate. In determining the necessity of the documentation requested, the business shall consider the following:
  - The nature of the personal information at issue (e.g., whether it is objective, subjective, unstructured, sensitive, etc.).
  - The nature of the documentation upon which the business considers the personal information to be accurate (e.g., whether the documentation is from a trusted source, whether the documentation is verifiable, etc.)
  - The purpose for which the business collects, maintains, or uses the personal information. For example, if the personal information is essential to the functioning of the business, the business may require more documentation.
  - The impact on the consumer. For example, if the personal information has a negative impact on the consumer, the business may require less documentation.
- Any documentation provided by the consumer in connection with their request to correct shall only be used and/or maintained by the business for the purpose of correcting the consumer's personal information and to comply with record-keeping obligations.
- The business shall implement and maintain reasonable security procedures and practices in maintaining any documentation relating to the consumer's request to correct.

A business may delete the contested personal information as an alternative to correcting the information if the deletion of the personal information does not negatively impact the consumer, or the consumer consents to the deletion.

In responding to a request to correct, a business shall inform the consumer whether it has complied with the consumer's request. A business may deny a consumer's request to correct if the business has denied the consumer's request to correct the same alleged inaccuracy within the past six months of receiving the request. However, the business must treat the request to correct as new if the consumer provides new or additional documentation to prove that the information at issue is inaccurate. A business may deny a request to correct if it has a good-faith, reasonable, and documented belief that a request to correct is fraudulent or abusive. The business shall inform the requestor that it will not comply with the request and shall provide an explanation why it believes the request is fraudulent or abusive. Where the business is not the source of the information that the consumer contends is inaccurate, in addition to processing the consumer's request, the business may provide the consumer with the name of the source from which the business received the alleged inaccurate information.

## Deletion Request Rights

You have the right to request that we delete any of your personal information that we collected from you and retained, subject to certain exceptions. Once we receive and confirm your verifiable consumer request, we will delete (and direct our service providers to delete) your personal information from our records, unless an exception applies.

We may deny your deletion request if retaining the information is necessary for us or our service providers to:

1. Complete the transaction for which we collected the personal information, provide a good or service that you requested, take actions reasonably anticipated within the context of our ongoing business relationship with you, or otherwise perform our contract with you.
2. Detect security incidents; protect against malicious, deceptive, fraudulent, or illegal activity; or prosecute those responsible for such activities.
3. Debug products to identify and repair errors that impair existing intended functionality.
4. Exercise free speech, ensure the right of another consumer to exercise their free speech rights, or exercise another right provided for by law.
5. Comply with the California Electronic Communications Privacy Act (Cal. Penal Code § 1546 seq.).
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 information's deletion may likely render impossible or seriously impair the research's achievement, if you previously provided informed consent.
7. Enable solely internal uses that are reasonably aligned with consumer expectations based on your relationship with us.
8. Comply with a legal obligation.
9. Make other internal and lawful uses of that information that are compatible with the context in which you provided it.

## Exercising Access, Data Portability, Deletion, and Opt-out Rights

To exercise the access, portability, deletion, or opt-out rights described above, please submit a verifiable consumer request to us by either:

- Calling us at: 815.227.0300
- Emailing: [privacy@savantwealth.com](mailto:privacy@savantwealth.com)
- Mailing: Concierge Team, Savant Wealth Management, 190 Buckley Drive, Rockford, IL 61107.

If you receive text messages from us, you may opt out of receiving further text messages from us by replying STOP to our message.

Only you or a person registered with the California Secretary of State that you authorize to act on your behalf may make a verifiable consumer request related to your personal information. You may also make a verifiable consumer request on behalf of your minor child.

You may only make a verifiable consumer request for access or data portability twice within a 12-month period. The verifiable consumer request must:

- Provide sufficient information that allows us to reasonably verify you are the person or an authorized representative of the person we collected personal information on.

- Describe your request with sufficient detail that allows us to properly understand, evaluate, and respond to it.

We cannot respond to your request or provide you with personal information if we cannot verify your identity or authority to make the request and confirm the personal information relates to you. Making a verifiable consumer request does not require you to create an account with us. We will only use personal information provided in a verifiable consumer request to verify the requestor's identity or authority to make the request.

#### **Opt-out Preference Signals**

The purpose of an opt-out preference signal is to provide consumers with a simple and easy-to-use method by which consumers interacting with businesses online can automatically exercise their right to opt-out of sale/sharing. Through an opt-out preference signal, a consumer can opt-out of sale and sharing of their personal information with all businesses they interact with online without having to make individualized requests with each business.

A business that sells or shares personal information shall process any opt-out preference signal that meets the following requirements as a valid request to opt-out of sale/sharing:

- The signal shall be in a format commonly used and recognized by businesses. An example would be an HTTP header field or JavaScript object.
- The platform, technology, or mechanism that sends the opt-out preference signal shall make clear to the consumer, whether in its configuration or in disclosures to the public, that the use of the signal is meant to have the effect of opting the consumer out of the sale and sharing of their personal information. The configuration or disclosure does not need to be tailored only to California or to refer to California.

A consumer may use an authorized agent to submit a request to opt-out of sale/sharing on the consumer's behalf if the consumer provides the authorized agent written permission signed by the consumer. A business may deny a request from an authorized agent if the agent cannot or does not provide to the business the consumer's signed permission demonstrating that they have been authorized by the consumer to act on the consumer's behalf. The requirement to obtain and provide written permission from the consumer does not apply to requests made by an opt-out preference signal.

#### **Response Timing and Format**

We endeavor to respond to a verifiable consumer request within 45 days of its receipt. If we require more time (up to 90 days), we will inform you of the reason and extension period in writing. If you have an account with us, we will deliver our written response to that account. If you do not have an account with us, we will deliver our written response by mail or electronically, at your option. Any disclosures we provide will only cover the 12-month period preceding the verifiable consumer request's receipt. The response we provide will also explain the reasons we cannot comply with a request, if applicable. For data portability requests, we will select a format to provide your personal information that is readily useable and should allow you to transmit the information from one entity to another entity without hindrance.

We do not charge a fee to process or respond to your verifiable consumer request unless it is excessive, repetitive, or manifestly unfounded. If we determine that the request warrants a fee, we will tell you why we made that decision and provide you with a cost estimate before completing your request.

#### **Non-Discrimination**

We will not discriminate against you for exercising any of your CCPA rights. Unless permitted by the CCPA, we will not:

- Deny you goods or services.
- Charge you different prices or rates for goods or services, including through granting discounts or other benefits, or imposing penalties.
- Provide you a different level or quality of goods or services.
- Suggest that you may receive a different price or rate for goods or services or a different level or quality of goods or services.

Savant uses services from Google and other third parties for advertising purposes. Information about how Google protects data may be found at [www.google.com/policies/privacy/](http://www.google.com/policies/privacy/).

#### **Emergency Contact**

From time to time due to unforeseen circumstances relating to the physical or mental health of a client, the best financial interests of the client may be served if Savant is able to communicate regarding the client with another individual. If the client has provided Savant with a properly executed copy of the client's power of attorney, Savant may contact the client's attorney-in-fact, if Savant reasonably believes doing so is in the best interest of the client. If the client has provided Savant with a properly executed copy of a Client Advocate Designation, Savant may communicate with the Client Advocate.

#### **Storage and Protection of Personal Information**

We maintain administrative, technical, and physical safeguards that are designed to protect the privacy and security of personal information. In order to help secure personal information collected from you as a Savant customer, including sensitive financial data, the information is protected by SSL encryption when it is exchanged between your web browser and Savant online services. However, the internet is not a fully secure environment, and we cannot ensure or warranty the security of any information transmitted to or generated by Savant in connection with Savant online services. There is no guarantee that information may not be accessed, disclosed, altered, or destroyed by breach of any of our administrative, technical, and physical, or other operational, safeguards. You play a critical role in protecting your information by maintaining up-to-date computer security protections. Steps you take to ensure the security of your computer, computer passwords, or other personal identifier authentication mechanisms are key components of the protection of your personal information. You agree that you are responsible for any additional verification procedures and security you deem necessary.

By using Savant online services, you agree that the procedures provided for in this Notice and the procedures implemented on Savant online services to protect personal information and to verify the identity of users, including, but not limited to, those procedures described in the foregoing paragraph, constitute commercially reasonable website security and customer verification procedures.

## Changes to Privacy Notice

The effective date of this Notice, as stated below, indicates the last time this Notice was reviewed and revised, if applicable. In the future, Savant may offer new and different programs that necessitate a change in this Notice. Savant reserves the right to change its privacy policy at any time without prior notice. Any changes to this Notice will be posted on our website under the Privacy section and will be effective immediately upon posting. Your continued use of our website or our advisory services indicates your acceptance of our updated Notice.

## Protecting Children's Privacy Online

We respect the privacy of children and encourage all parents to supervise their children's computer usage. We do not intend to invite children to visit Savant online services and we do not knowingly collect or retain personal information from children under the age of thirteen (13). For more information on the Children's Online Privacy Protection Act (COPPA), please visit the Federal Trade Commission website at [www.ftc.gov](http://www.ftc.gov).

## Governing Law and Jurisdiction

This Notice, and Savant's collection and use of customer information, shall be governed and interpreted in accordance with the GLBA, the State of Illinois, and the State of California. Any disputes arising out of this Policy shall be adjudicated in a court of competent jurisdiction in the Eastern District of the State of Illinois.

## Phishing Scams

Savant does not send emails to customers requesting billing, login, or password information. If you receive an email purporting to be from Savant 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 Savant. Such emails may be fraudulent and used in connection with scams known as phishing. Savant asks that you report any suspicious emails or websites to Savant at the number below.

## Disposal of Information

Savant has taken steps to reasonably ensure that the privacy of your nonpublic personal information is maintained at all times, including in connection with 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.

## Contact and Modifying Personal Information

If you should ever decide to close your account(s) or become an inactive client, we will continue to adhere to the privacy policies and practices as described in this Notice. Should you have any questions about the privacy and protection of your records, please contact us and we will be happy to discuss this matter with you. You may request copies of or have Savant make changes or corrections to personal information in Savant's possession by contacting Savant at [privacy@savantwealth.com](mailto:privacy@savantwealth.com). You may opt out

of receiving further communications from us or others through any of the following methods:

- Send an email to [privacy@savantwealth.com](mailto:privacy@savantwealth.com)
- Send a request by mail to: Concierge Team, Savant Wealth Management, 190 Buckley Drive, Rockford, IL 61107
- Call: 815.227.0300

Please note that you cannot opt out of receiving any notifications or disclosures that we are required by Federal or State law to provide to you.

## Definitions

**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:** Companies related by common ownership or control. They can be financial and nonfinancial companies.

**Non-Affiliates:** Companies not related by common ownership or control. They can be financial and nonfinancial companies.

**Joint Marketing:** A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

## Links to Other Websites

Our online services may contain links to other websites belonging to third parties that are not affiliated with us. The inclusion of a link on our online services does not imply endorsement of the linked website or service by us. While we try to link only to websites that share our high standards and respect for privacy, we are not responsible for the content, security, or privacy practices employed by other websites, or links posted on our website. Information you disclose to other parties or through such sites is subject to the privacy and security practices and policies of those parties or websites. We disclaim all liability, to the extent permissible, with regard to your access to such linked websites. Access to any other websites is at your own discretion, and we encourage our users to read the privacy statements of each and every website or online services visited in order to learn how such third parties may treat your information.

## Data Security

### *We're Here to Help*

Data security, cybercrime, and identity theft are growing concerns for all of us. Team Savant is dedicated to helping ensure your information is safe and secure. If you ever have security-related concerns, please do not hesitate to call us at the number below. We will work closely with you to ensure a rapid and personal response to your concerns. If you are the victim of fraud or identity theft, please contact your Savant advisor or client services representative immediately.

### *Our Role in Protecting Your Data*

Savant understands that you have entrusted us with vital personal information. We want you to know that we take our responsibility to protect your information extremely seriously. Savant regularly reviews and evaluates both its privacy and security policies and adapts them as necessary to deal with the constantly changing data security landscape. We remain current with the regulatory

requirements surrounding privacy laws and make changes as appropriate. We protect our computing systems and data through a multi-layered security approach that is built on industry best practices, and we regularly provide employee training and policy oversight.

*Our Custodian Partners' Role*

We also work closely with our clients' custodians to remain up to date and closely aligned with their policies, procedures, and practices. We encourage you to contact your custodian or visit their website for additional information about the ways they also protect your information.

**Contact Us**

If you ever have security-related concerns, please call us at 815.227.0300 or email us at [privacy@savantwealth.com](mailto:privacy@savantwealth.com).