

# FACTS

## WHAT DOES XENDIA 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:

- **Social Security Number and Income**
- **Investment Experience and Assets**
- **Employment Information and Risk Tolerance**

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

### 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 Xendia chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Xendia share?	Can you limit this sharing?
<b>For our everyday business purposes</b> – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	<b>YES</b>	<b>NO</b>
<b>For our marketing purposes</b> – to offer our products and services to you	<b>NO</b>	<b>We Don't Share</b>
<b>For joint marketing with other financial companies</b>	<b>NO</b>	<b>We Don't Share</b>
<b>For our affiliates' everyday business purposes</b> – information about your transactions and experiences	<b>NO</b>	<b>We Don't Share</b>
<b>For our affiliates' everyday business purposes</b> – information about your creditworthiness	<b>NO</b>	<b>We Don't Share</b>
<b>For our affiliates to market to you</b>	<b>NO</b>	<b>We Don't Share</b>
<b>For nonaffiliates to market to you</b>	<b>NO</b>	<b>We Don't Share</b>

### Questions?

Call **+1 (305) 415-0060** or go to **[www.xendia.us](http://www.xendia.us)**

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## Who we are

Who is providing this notice?

**Xendia Wealth LLC**

## What we do

**How does Xendia 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.

Xendia maintains safeguards that comply with federal standards to protect nonpublic personal information of our customers, including procedures to assure appropriate access to, and use of, information about our customers.

**How does Xendia collect my personal information?**

We collect your personal information, for example, when you

- **Seek advice about your investments** or **Enter into an investment advisory contract**
- **Provide your driver's license** or **Give us your contact information**
- **Tell us about your investment or retirement portfolio**

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.

## Definitions

**Affiliates**

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

- ***Xendia does not share with our affiliates.***

**Non Affiliates**

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- ***Xendia does not share with nonaffiliates so they can market to you.***

**Joint Marketing**

A formal agreement between non affiliated financial companies that together market financial products or services to you.

- ***Xendia does not jointly market.***

## Cookies

### What are cookies and how does Xendia use them?

Cookies are files or information that can be stored on your devices when you visit websites or use online services. Xendia utilizes cookies to facilitate the use and experience of the website and applications to the interests and needs of the users, as well as to assist and improve its structures and content. Cookies can also be used to speed up your future activities and experiences on our services.

## Types of Cookies

### Necessary

**Necessary cookies** are essential for the website to function properly. These cookies ensure basic functionalities and security features of the website. You can set your browser to block or alert you about these cookies, but doing so may prevent parts of the website from working correctly.

### Functional

**Functional cookies** allow the website to remember your choices and thus offer a customized experience. They also allow users to watch videos, use social media, fields for comments, forums, among others.

### Performance

**Performance cookies** help understand how visitors interact with the website. Information is collected about the visited areas, the time spent and any problems encountered, with its error messages. We use Google Analytics to monitor the traffic and also to measure and improve the website's performance.

### Marketing

**Marketing cookies** are used to offer more relevant and interesting content to the user. They can present advertising with better targeting or to limit the quantity shown on the website pages. Also allowing to measure the effectiveness of an advertising campaign.

## Third Party Cookies

Third Party Cookies are transferred to your device by an authorized third party. We have no control over the cookies set by other sites that you visit, even if you are directed to them from our site. However, we may work with certain third-party providers, such as Google or Facebook, to allow their cookies to work through our website, enabling the organization to provide you with a better experience and personalized services on our website.

## Cookies Management

It is possible that you, while using our services, use the settings of your preferred browser at any time to disable or remove cookies. Beware that when cookies are blocked, certain functionalities of our services may not work as expected, and some aspects of information security and fraud prevention may be impacted.