

FACTS. WHAT DOES CARBON COLLECTIVE INVESTING LLC 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 date of birth
- Account balances and transactions
- Investment experience and risk tolerance

When you are no longer our customer, we may continue to share your information only 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 Carbon Collective Investing LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Carbon Collective Investing LLC share?	Can you limit this sharing?
For 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	No	We don't share
For our affiliates' everyday business purposes – information about your creditworthiness	No	We don't share
For non-affiliates to market to you	No	We don't share

Who we are

Who is providing this notice? Carbon Collective Investing LLC

What we do

How does Carbon Collective Investing LLC 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.

How does Carbon Collective Investing LLC collect my personal information? We collect your personal information, for example, when you

- Open an account
- Deposit money

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

Definitions

Affiliates Companies related by common ownership or control. They can be financial and non-financial companies. Carbon Collective Investing LLC does not currently have any affiliates.

Non-affiliates Companies not related by common ownership or control. They can be financial and non-financial companies. Carbon Collective Investing LLC does not currently share personal information with non-affiliates except as necessary to provide contracted services.

Joint Marketing A formal agreement between non-affiliated financial companies that together market financial products or services to you. Carbon Collective Investing does not currently have any Joint Marketing agreements.

Other Important Information –

CCI's Privacy Policy can be reviewed at <https://blog.carboncollective.co/legal-documents>