



344 W Brigham Rd, Saint George, Utah 84790

www.evestia.com

March 31, 2026

Evestia Privacy Policy

Evestia LLC (“Evestia”) is committed to protecting your privacy. This policy explains what non-public personal information we collect, how we use and share it, and how we protect it. It is provided in accordance with Regulation S-P and the Gramm-Leach-Bliley Act.

1. Information We Collect

We collect non-public personal information from the following sources:

- Information you provide through our Site (www.evestia.com), including via our risk questionnaire and Investment Profile — such as your name, address, Social Security number, income, net worth, risk tolerance, and investment objectives.
- Account and transaction information from you or our custodian — such as account balance, transaction history, and payment history.
- Information from consumer reporting agencies, where applicable.
- Technical data collected automatically when you use the Site — such as IP address, browser type, device identifiers, and pages visited — via cookies and similar technologies.

2. How We Use Your Information

We use your information to:

- Provide automated investment advisory services, including assigning and managing your investment plan.
- Open, maintain, and service your account.
- Send account statements, confirmations, and required regulatory disclosures.
- Comply with legal and regulatory obligations as an SEC-registered investment adviser.
- Detect and prevent fraud and unauthorized access.
- Improve our platform and services.

3. Information We Share

We do not sell your personal information. We do not share it with unaffiliated third parties for their independent marketing purposes.

We may share your information only as necessary with:

- Our custodian (currently Altruist Financial LLC), to open and maintain your account, execute trades, and provide statements.
- Advyzon Investment Management, LLC and the Advyzon Nucleus Model Marketplace, in connection with our model licensing activities. TPA Program participants are clients of their Third-Party Advisor, not Evestia; we do not receive or store TPA User personal information.
- Service providers supporting our operations (e.g., technology and security vendors), subject to confidentiality obligations.
- Regulatory authorities, law enforcement, or courts, as required or permitted by law.
- Successor entities in a merger or acquisition, subject to equivalent confidentiality commitments.

Evestia has a revenue-sharing agreement with an unaffiliated third-party marketer for securing model marketplace relationships. This marketer does not receive client personal information.

4. Cookies and Site Data

We use cookies to maintain your session and improve your experience on the Site. You may disable cookies in your browser settings, though this may limit certain Site features. We do not use cookies or tracking data to sell your information to advertisers.

5. Data Security

We maintain physical, electronic, and procedural safeguards to protect your information from unauthorized access or disclosure. Access is limited to employees and service providers who need it to serve you. If a breach occurs that is reasonably likely to harm you, we will notify you as required by applicable law.

6. Retention

We retain your information as long as needed to provide services and meet our legal obligations. SEC rules require us to maintain certain records for a minimum of five years under Rule 204-2. These practices apply to former and inactive clients as well.

7. Retirement Accounts

If your account is an IRA or other tax-advantaged account, we apply the same confidentiality standards described in this policy and comply with any additional applicable legal requirements.

8. Changes to This Policy

We may update this policy at any time. For material changes, we will provide at least 30 days' advance notice by email or through a prominent notice on the Site, except where a shorter period is required by law.

9. Contact Us

Questions about this policy? Contact us at:

Evestia LLC: 344 W Brigham Rd, Saint George, Utah 84790

Email: hello@evestia.com | Phone: 801-960-3228