

Privacy Policy

Last Modified: July 21st, 2025

IAMS is committed to protecting your privacy. This Web Privacy Notice (“Notice”) describes how IAMS Wealth Management, LLC. (“IAMS,” also referred to as “we” and “us”) processes personal data in connection with our web visitors and individuals not subject to another notice but with which we are the controller of their data. This notice does not apply to California Residents. If you are a California Resident, please see the California Resident notice. We request that you carefully read this Privacy Policy and our Terms of Use before using the website. By visiting, viewing or using the website in any manner you are agreeing to the terms set forth in this Privacy Policy, as well as the Terms of Use for the Website.

Personal Information We Collect and How We Collect It

You can visit us on the internet without telling us who you are or providing any information about yourself, including your email address. However, we may collect information automatically from you through your visit, which is described below. There are times when we may ask you for information about yourself to assist us in meeting your various needs. In these cases, your browsing will no longer be anonymous to us. To provide these services, we may need to ask you directly to provide, among other things, your name, physical and/or mailing address, e-mail address and phone number.

Please note that we do not knowingly solicit information from consumers under eighteen (18) years of age and we do not knowingly market our products or services to children.

Cookies and Web Beacons

We use a variety of online technologies, such as cookies, web beacons, and similar mechanisms, as described further below, to collect information that helps us understand how our websites are used. Specifically, IAMS or our service providers may automatically collect a variety of technical and navigational information about you via these technologies, including, as applicable:

- Your computer or device type;
- Operating system version;
- Browser type and version;
- User agent string;
- Internet connection type;
- Date and time of your visit;

- Time since your last visit;
- Pages you view;
- Links you click;
- Searches you conduct;
- Your internet protocol (IP) address used to access our websites;
- Your general geographic location (e.g. your city, state, or zip code);
- And the website visited before or after our sites.

We may also use similar tracking technologies in emails that we or our service providers send to you. This information may be used, for example, to alert you to software compatibility issues, to resolve technical or service problems, and for security purposes. We also analyze this information, with the assistance of our service providers, to improve our website design and functionality, to enhance our ability to serve you and your accounts, and to tailor our communications to you regarding our products and services.

Cookies: A cookie is a small file of letters and numbers that is stored on your computer or other device when you visit a website. Cookies contain information that is transferred to or read on your device and allow websites to recognize devices and store certain information, such as user preferences. Cookies are used to distinguish you from other users of our online services. This helps us to provide you with a useful experience when you browse and also allows us to improve our online services. We and our service providers use session cookies, which link your actions during a particular online session and expire at the end of that session, as well as persistent cookies, which remain on your device and allow us to remember your actions or preferences across multiple browser sessions.

If you are concerned about having cookies on your computer or other device, you can set your browser to refuse all cookies or to indicate when a cookie is being set, allowing you to decide whether to accept it. You can also delete cookies from your device. The help feature on most web browsers will inform you how to prevent your browser from accepting new cookies, how to receive notice when a new cookie is being set, and how to disable cookies altogether. However, if you chose to block or delete cookies, certain features on our websites may not operate correctly.

For further information about deleting or blocking cookies, please visit allaboutcookies.org/how-to-manage-cookies.

Web Beacons: Our websites and the emails that you receive from IAMS use an application known as a web beacon (also known as a pixel tag or clear gif). A web beacon is an

electronic file that usually consists of a single-pixel image, embedded in a web page or an email to measure usage and activity. In some cases, a web beacon triggers the placement of a persistent cookie on your device.

Our websites offer customized features that require our use of cookies and web beacons. Certain sections of our websites utilize cookies to support site or application performance and provide enhanced authentication. For example, cookies enable us to personalize and improve your user experience and help enhance navigation. Cookies also help us to understand how people use our online services so that we can improve their structure, functionality, and content. Web beacons allow us, directly or through our service providers, to collect information used for website analytics, such as how many users have visited particular pages or downloaded documents, or how frequently users search for a particular term. However, our use of these cookies and web beacons is limited. We do not use them to view or collect data in cookies or similar data files created by other websites. We will not share the information in these data files or give others access to it – except to help us better serve your needs and as described in this privacy policy.

Emails: We and our service providers use web beacons to determine whether and when you receive or open our emails. These beacons may also capture information about the type of device, operating system, email program, and web browser used to view the email, the IP address from which you opened the email, and whether you click any links in the email. These beacons are utilized to gauge the effectiveness, relevance, and value of our email communications, as well as to target relevant advertising to you and to measure the impact of the advertising on your IAMS relationship.

Our websites include links to third-party sites or information that we think may be of interest to you. When you click these links and leave our websites, our sites' terms and conditions of use and privacy policy no longer apply. You are responsible for complying with the third-party site's terms of use. See the linked site's privacy policy for information on the site's privacy practices.

Website Analytics and Internet-Based Advertising

We engage a service provider to analyze, audit, research, and report on the cookies and web beacons utilized above. In particular, our websites use Google Analytics to help collect and analyze certain information for the purposes discussed above. Google Analytics is a web analytics service offered by Google, Inc. that tracks and reports website traffic. This data is shared with other Google services. Google may use the collected data to contextualize and personalize the ads of its own advertising network.

You can opt-out of having made your activity available to Google Analytics by installing the Google Analytics opt-out browser add-on. The add-on prevents the Google Analytics JavaScript (ga.js, analytics.js and dc.js) from sharing information with Google Analytics about your activity. For more information on the privacy practices of Google, please visit the Google Privacy web page at <https://policies.google.com/privacy>.

How We Use Your Information and Our Purpose for Collecting Personal Information from You

We may use information that we collect about you or that you provide to us, including any personal information, for the following purposes:

- To improve our website design and functionality;
- To ensure temporary and persistent service continuity;
- To resolve technical or service issues with our technology;
- To tailor and send you communications regarding our products or services;
- To operate and administer our events;
- To our outside auditors, lawyers, accountants, or other professionals who advise and assist us regarding the lawful and effective management of our organization;
- To comply with a legal request or order, or comply with laws and regulations;
- To monitor, investigate, and enforce compliance with and potential breaches of our policies, procedures, and terms of use; and
- To exercise or defend our legal rights and the rights of our employees, affiliates, customers, contractors, agents and producers.

How We Share Your Personal Information

IAMS shares your personal information as outlined below and this is also how IAMS has shared personal information in the past twelve months. IAMS may share, and has shared within the last twelve months, all categories of collected information listed above:

- With third-party service providers to perform services on behalf of IAMS. Our Service Providers are given access to personal information only as reasonably necessary and are subject to confidentiality obligations in their service agreements;
- With third-party service providers assisting IAMS with research, analytics, anti-fraud, anti-phishing, anti-spamming, marketing, and data enrichment or for them to reach out to you on our behalf; and

- With auditors, lawyers, accountants, and other professional advisors who advise and assist us in relation to the lawful and effective management of our organization and in relation to any disputes we may become involved in.

IAMS does not sell your personal information and has not sold consumers' personal information in the past twelve months. IAMS does not knowingly share the personal information of consumers under eighteen (18) years of age.

How We Safeguard Your Information

We are committed to maintaining the security of your personal information. We use administrative, technical, and physical security measures designed to safeguard your information against loss, theft, unauthorized use, disclosure, or modification. We also take measures to ensure service providers that process personal information on our behalf also have appropriate security controls in place.

Please note that regardless of security measures, no system is completely infallible. While we strive to safeguard your information, we cannot guarantee that unauthorized access, hacking, data loss, or a data breach will never occur.

Updates or Amendments to this Notice

We recognize that data privacy is an ongoing responsibility of IAMS. We reserve the right to update or amend this Notice from time to time and any such updates or amendments will be reflected in the Notice available on our website.

Contact Information

To ask questions or comment about this privacy notice and our privacy practices, contact us at

Privacy Notice

Last Modified: Oct. 29, 2024

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Personal Information We Collect and How We Collect It

You can visit us on the internet without telling us who you are or providing any information about yourself, including your email address. However, we may collect information automatically from you through your visit, which is described below. There are times when we may ask you for information about yourself to assist us in meeting your various needs. In these cases, your browsing will no longer be anonymous to us. To provide these services, we may need to ask you directly to provide, among other things, your name, physical and/or mailing address, e-mail address and phone number.

Please note that we do not knowingly solicit information from consumers under eighteen (18) years of age and we do not knowingly market our products or services to children.

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- Your computer or device type;
- Operating system version;
- Browser type and version;
- User agent string;
- Internet connection type;
- Date and time of your visit;
- Time since your last visit;
- Pages you view;
- Links you click;
- Searches you conduct;
- Your internet protocol (IP) address used to access our websites;
- Your general geographic location (e.g. your city, state, or zip code);
- And the website visited before or after our sites.

We may also use similar tracking technologies in emails that we or our service providers send to you. This information may be used, for example, to alert you to software compatibility issues, to resolve technical or service problems, and for security purposes. We also analyze this information, with the assistance of our service providers, to improve our website design and functionality, to enhance our ability to serve you and your accounts, and to tailor our communications to you regarding our products and services.

Cookies: A cookie is a small file of letters and numbers that is stored on your computer or other device when you visit a website. Cookies contain information that is transferred to or read on your device and allow websites to recognize devices and store certain information, such as user preferences. Cookies are used to distinguish you from other users of our online services. This helps us to provide you with a useful experience when you browse and also allows us to improve our online services. We and our service providers use session cookies, which link your actions during a particular online session and expire at the end of that session, as well as persistent cookies, which remain on your device and allow us to remember your actions or preferences across multiple browser sessions.

If you are concerned about having cookies on your computer or other device, you can set your browser to refuse all cookies or to indicate when a cookie is being set, allowing you to decide whether to accept it. You can also delete cookies from your device. The help feature on most web browsers will inform you how to prevent your browser from accepting new cookies, how to receive notice when a new cookie is being set, and how to disable cookies altogether. However, if you chose to block or delete cookies, certain features on our websites may not operate correctly.

For further information about deleting or blocking cookies, please visit allaboutcookies.org/how-to-manage-cookies.

Web Beacons: Our websites and the emails that you receive from IAMS use an application known as a web beacon (also known as a pixel tag or clear gif). A web beacon is an electronic file that usually consists of a single-pixel image, embedded in a web page or an email to measure usage and activity. In some cases, a web beacon triggers the placement of a persistent cookie on your device.

Our websites offer customized features that require our use of cookies and web beacons. Certain sections of our websites utilize cookies to support site or application performance and provide enhanced authentication. For example, cookies enable us to personalize and improve your user experience and help enhance navigation. Cookies also help us to understand how people use our online services so that we can improve their structure, functionality, and content. Web beacons allow us, directly or through our service providers,

to collect information used for website analytics, such as how many users have visited particular pages or downloaded documents, or how frequently users search for a particular term. However, our use of these cookies and web beacons is limited. We do not use them to view or collect data in cookies or similar data files created by other websites. We will not share the information in these data files or give others access to it – except to help us better serve your needs and as described in this privacy policy.

Emails: We and our service providers use web beacons to determine whether and when you receive or open our emails. These beacons may also capture information about the type of device, operating system, email program, and web browser used to view the email, the IP address from which you opened the email, and whether you click any links in the email. These beacons are utilized to gauge the effectiveness, relevance, and value of our email communications, as well as to target relevant advertising to you and to measure the impact of the advertising on your IAMS relationship.

Our websites include links to third-party sites or information that we think may be of interest to you. When you click these links and leave our websites, our sites' terms and conditions of use and privacy policy no longer apply. You are responsible for complying with the third-party site's terms of use. See the linked site's privacy policy for information on the site's privacy practices.

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You can opt-out of having made your activity available to Google Analytics by installing the Google Analytics opt-out browser add-on. The add-on prevents the Google Analytics JavaScript (ga.js, analytics.js and dc.js) from sharing information with Google Analytics about your activity. For more information on the privacy practices of Google, please visit the Google Privacy web page at <https://policies.google.com/privacy>.

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- To improve our website design and functionality;
- To ensure temporary and persistent service continuity;
- To resolve technical or service issues with our technology;
- To tailor and send you communications regarding our products or services;
- To operate and administer our events;
- To our outside auditors, lawyers, accountants, or other professionals who advise and assist us regarding the lawful and effective management of our organization;
- To comply with a legal request or order, or comply with laws and regulations;
- To monitor, investigate, and enforce compliance with and potential breaches of our policies, procedures, and terms of use; and
- To exercise or defend our legal rights and the rights of our employees, affiliates, customers, contractors, agents and producers.

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- With third-party service providers to perform services on behalf of IAMS. Our Service Providers are given access to personal information only as reasonably necessary and are subject to confidentiality obligations in their service agreements;
- With third-party service providers assisting IAMS with research, analytics, anti-fraud, anti-phishing, anti-spamming, marketing, and data enrichment or for them to reach out to you on our behalf; and
- With auditors, lawyers, accountants, and other professional advisors who advise and assist us in relation to the lawful and effective management of our organization and in relation to any disputes we may become involved in.

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Contact Information

To ask questions or comment about this privacy notice and our privacy practices, contact us at mike@iamswm.com.