



Privacy Policy

Trustate takes your privacy seriously and is sensitive to potential concerns about how we use the personal information we collect from and about you. In addition to this Privacy Policy, we have internal policies and practices designed to keep your personal information secure and to ensure that information about you is only used consistent with this Privacy Policy. We actively apply principles of privacy by design and have a privacy team that is committed to helping to ensure that your personal information is safe and is handled properly.

This Privacy Policy describes how Trustate collects, uses, processes, and discloses personal information of consumers.

The scope of this Privacy Policy covers both your use of Trustate's website, www.mytrustate.com (the "website") and any other ways in which you may interact with Trustate, such as when you speak to us on the phone. It also describes the choices available to you regarding our use of your personal information. Information for California residents is also included within this policy.

This Privacy Policy is incorporated into our [Terms of Use](#) and Terms of Service, and therefore governs your use of Trustate's services. By using Trustate's services, you accept the terms of this Privacy Policy. If you have questions or concerns about the Privacy Policy, or would like to exercise any of your rights around how data about you is used, you can let us know by contacting us at info@mytrustate.com. If you are a consumer with a disability and are having trouble accessing this Privacy Policy, you may request to receive this Privacy Policy by emailing info@mytrustate.com.

Information We Collect About Consumers.

In this section of the Privacy Policy, we explain what types of Personal Information we may collect about consumers. The Personal Information collected depends on the type of interaction we have with a consumer (such as calling, visiting our website, or using one of our mobile apps), the types of products a consumer considers or purchases, and what information Trustate's customers choose to share with us. This section includes all of the information that we may collect about consumers but we will rarely collect all of these types of information about any single person.

As used in this Privacy Policy, Personal Information means information that relates, and is capable of being linked, to a particular person. It does not include de-identified or aggregate information.

Trustate potentially collects the following categories of information about consumers, some of which may be collected or maintained in a manner such that it can be considered Personal Information:

Identifiers: Examples of the types of identifiers that Trustate may collect include real names, nicknames, postal addresses, online identifiers, Internet Protocol addresses (“IP addresses”), email addresses, account numbers, Social Security numbers, driver’s license numbers, passport numbers, and other government identification numbers.

Other types of information: Examples of other types of information include physical characteristics or descriptions of you, telephone number, insurance policy number, education, employment, financial information including bank account, credit card, and debit card numbers, and health insurance information. It also includes additional information provided to Trustate directly by you, such as when you complete a questionnaire, answer a survey, or receive a financial consultation. This category includes information identified as Personal Information in California Civil Code Section 1798.80(e) that is not otherwise categorized.

Characteristics protected under some laws: Examples of the types of characteristics that Trustate may collect include age, national origin, citizenship, marital status, medical information, sex, sexual orientation, and veteran or military status.

Commercial information: Examples of the types of commercial information that Trustate may collect includes records of business and other property owned, products or services purchased, obtained, or considered from Trustate or our partners, and other purchasing or consuming histories or tendencies.

Internet information: Examples of the types of internet or other electronic network activity information that Trustate may collect includes browsing history, search history, information about the device the consumer is using to access our website or applications, and information regarding a consumer’s interaction with Trustate’s or our partners’ websites, applications, or advertisements. We may also collect information from visitors to our website such as browser settings, operating systems, referring/exit pages, and clickstream data. When we send you an email, Trustate may also collect information, including about how you interact with that email.

Geolocation information: Trustate may collect information about where a consumer resides or is otherwise located.

Audio and visual information: Trustate may make audio recordings of calls with consumers. We may make visual recordings of consumers when they visit our premises or when consumers agree that Trustate may take their photograph or videotape them. We do not collect thermal or olfactory information.

Professional and employment-related information: Examples of the types of professional and employment-related information Trustate may collect includes information about professional status and affiliations, employment history, and employment status.

We do not collect biometric or education information that is maintained by an educational institution or party acting on an educational institution’s behalf. We also do not collect inferences

about consumers, although as described below, we may internally create inferences based on the information that we do collect.

Where We Collect Information About Consumers.

In this section of the Privacy Policy, we explain where and how we collect data about consumers. We receive information about consumers from several categories of sources. To learn more about which categories of information we collect from which source, please refer to the chart in the section below entitled **Summary of Trustate's Practices Regarding Consumer Information**.

Consumers: The vast majority of the information that Trustate collects comes directly or indirectly from the consumer that it relates to. Information that is collected directly from you is information that you provide when you complete a form online, use a chat feature, or speak to us on the phone. We may also collect information indirectly about you when you interact with our website, through the use of cookies and other tracking technologies. Indirect collection is described in more detail in the section below called "How Trustate Uses Cookies and Similar Technologies."

Related Consumers: We may collect information about you from someone you know. For instance, if you are a shareholder in a business that is formed through Trustate, we may be given information about you in order to complete the formation.

Employers: We may collect information about you from your employer if your employer has elected to provide you with employment benefits through Trustate. For instance, your employer will tell Trustate when you are first eligible to receive services from Trustate as part of your benefits.

Service Providers: We may collect information about you from our Service Providers. As used in this Privacy Policy, Service Providers means entities that Trustate has contracted with to provide us with services to help fulfill our business needs. An example of the type of information that we may receive from a Service Provider is information about whether any Legal Mail has been received as part of our Registered Agent services. Service Providers may also assist us in collecting information both directly and indirectly from you.

Professionals (including Legal Plan Attorneys and other Professionals): We may collect information about you from the independent professionals with whom you may schedule a consult with through our Legal Plan or other product offerings. An example of the type of information that we may receive from these professionals includes the fact that a consult has occurred. While we cannot control what information legal plan attorneys share with us, Trustate does not intend to collect any information from attorneys where the collection would result in a waiver of the attorney-client privilege.

Business Partners and Affiliates: We may collect information about you from our business partners and affiliates. An example of the type of information that we may receive from business

partners and affiliates is information about the product you purchased from them after you indicated an interest in an offer that Trustate presented to you.

Publicly/Commercially Available Information: We may collect information related to you from publicly available sources of information, including government records and commercially available sources of consumer information. Examples of the type of information we may collect from publicly available sources are whether your entity is in good standing with a Secretary of State or whether you have recently expressed interest in purchasing a product that Trustate sells.

Unrelated Parties: We may receive information related to you from people and entities with whom Trustate does not have a direct relationship. An example of the type of information that we may receive from unrelated third parties is documents that we receive on your behalf in our role as your Registered Agent.

How We Use the Information We Collect About Consumers.

In this section of the Privacy Policy, we explain our commercial and business purposes for collecting information about consumers. Trustate uses the information that it has collected about consumers, for the purposes listed below. In some instances, we may combine information that we have collected from multiple sources in order to fulfill these purposes. Trustate potentially uses each category of information that we collect for each of these purposes.

If, in the future, Trustate wishes to use information about you in a manner that is not consistent with the purposes outlined below, we will seek your consent prior to the expanded use if and where we are legally required to do so.

Providing Products and Services: Trustate collects information for the purpose of providing products and services. We may also use information to respond to inquiries from potential customers who are interested in learning more about our products and services. Examples of the types of uses of consumer information for these purposes include producing and delivering documents purchased by consumers, administering the Trustate website, and displaying content based on consumer preferences.

Security: Trustate collects information for the purpose of ensuring that we maintain appropriate security over computer networks and our physical facilities. We may also collect information for the purposes of detecting fraud or other suspicious activities.

Meeting Legal Requirements: Trustate collects information in order to meet our legal obligations. These obligations may include satisfying screening requirements prior to assisting with entity formations, maintaining records as required in our role as Registered Agent, or responding to subpoenas for information.

Marketing: Trustate collects information for use in marketing to current and prospective customers. More information about how you can control the marketing you receive from Trustate

is located in the sections “How Trustate Uses Cookies and Similar Technologies” and “How You Can Control The Information Trustate May Have About You.”

Product Development: Trustate collects information for use in improving our existing products and developing new products.

Analytics: Trustate collects information for use in performing various types of analytics. For example, Trustate uses information to analyze how visitors interact with our website, where visitors to our website arrive from and exit to, and gaining insights into the types of consumers that may be interested in our products and services. We may also use information to develop inferences from the information we collect regarding consumer preferences, characteristics, predispositions, behaviors, and attitudes.

Operational Purposes: Trustate collects information for use for our operational purposes, and the operational purposes of our service providers and business partners. For instance, Trustate may use information for maintaining our website and other infrastructure, training and quality assurance, for conducting surveys or sweepstakes, to promote our brand, and to use in connection with our relationships with service providers and business partners.

Sharing with Business Partners: Trustate collects information in order to provide business partners’ information in connection with consumers who have either expressed interest in hearing from the business partner or who have purchased a bundled product through Trustate.

Financial Reporting: Trustate collects information for use in various types of financial reporting and other similar internal uses. Examples of the types of financial reporting that Trustate may use consumer information in connection with are internal budgets and projections, calculation of compensation, and reporting to investors.

Business Transfers: If Trustate undertakes or is involved in any merger, acquisition, reorganization, sale of assets, bankruptcy, or insolvency event, then we may sell, transfer or share some or all of our assets, including information related to consumers in connection with the transaction or in contemplation of the transaction (such as conducting due diligence). If such an event occurs, your information may be treated like any other Trustate asset and sold, transferred, or shared with third parties, or used in ways not contemplated or permitted under this Privacy Policy. In this case, you will be notified via email and/or a prominent notice on our site of any change in ownership or uses of your Personal Information, as well as any choices you may have regarding your Personal Information.

In addition to the purposes listed above, Trustate may also use de-identified or aggregate data that is not capable of being linked to any individual consumer for additional purposes not listed above.

How We Share Consumer Information and Who We Share It With.

In this section of the Privacy Policy, we explain who we share consumer information with and under which circumstances we may do so. To learn more about which categories of information

are shared with which third parties, please refer to the chart in the section below entitled **Summary of Trustate's Practices Regarding Consumer Information**.

Service Providers: Trustate may share information about consumers with Service Providers who assist us with completing the business purposes outlined in the "How We Use the Information We Collect About Consumers" section. These companies are not authorized to use the information we share with them for any other purpose other than providing services to Trustate or to you.

Professionals (including Attorneys and other Professionals): Trustate may share consumer information with the independent professionals that can be accessed through products such as our legal plans and attorney-assisted products.

Business Partners and Affiliates: Trustate may share information with business partners and affiliates in limited circumstances. These include:

- If you express interest in an offer made by a business partner, we may provide information about you in connection with the offer you have selected. If you later decide to opt-out from allowing Trustate to share your information with business partners for their marketing purposes, you may do so by emailing info@mytrustate.com. To the extent that Trustate has already shared your information prior to your decision to opt-out, you may opt out from future marketing by contacting our business partners directly.
- When you purchase a product from us that is bundled with a product offered by one of our business partners, we will share information about you with those business partners so that they can provide you with the product or services included with your purchase. These companies are not authorized to use the information we share with them about you for their own marketing purposes without first asking for your permission.

Employers: Trustate may share information with employers who have elected to provide employment benefits through Trustate. This is done for operational purposes, such as verification of employee emails. Trustate does not share Personal Information that is collected during advice sessions with employers.

Related Consumers: In limited circumstances, we may provide information about you to someone you know. For instance, we may provide information connected to your account with Trustate to your authorized contacts.

Government Entities: Trustate may share information about consumers with government entities in order to fulfill the products purchased by our customers. Certain Personal Information becomes public record when documents are filed with the federal or state government, or with a court. For example, a corporation's name, business address, and registered agent name become public information when its articles of incorporation are filed. A Secretary of State may publish this information to its website or provide this information to third parties for a fee. The U.S. Patent and

Trademark Office publishes the names and addresses of trademark registrants. This Privacy Policy does not cover these or similar third-party actions.

Public Postings: Trustate may publicly share information about consumers, such as by displaying the information on our website or having the information published in publicly available media, in a limited number of circumstances.

- We may share information publicly when it is necessary in order to fulfill a product that has been purchased by a customer. For example, in some states, fictitious business names, including the name and address of the business owner, must be published in a newspaper.
- We may display personal testimonials of satisfied customers received through email surveys on our website or other marketing. If you wish to update or delete your testimonial, you can contact us at info@mytrustate.com.
- When consumers leave us reviews either on the Trustate website, or on other publicly available websites, we may display these customer reviews on the Trustate website. If you provide a review that we display and wish to update or delete it, you can also contact us at info@mytrustate.com. We will delete your review at your request or if, at our discretion, we choose not to update your review as requested.
- Our website includes areas where users may interact with each other, including a question and answer section. Any information that is provided in these areas of our website may be publicly available. You should use caution when deciding whether to disclose your Personal Information in these areas of the site. To request removal of your information from our community forums, contact us at info@mytrustate.com. In some cases, we may not be able to remove your Personal Information, in which case we will let you know if we are unable to do so and why.
- When we collect publically available information, we may share that information on our website.

Registered Agent Requests: If you designate a person or company other than Trustate to serve as the registered agent for your business entity, Trustate may provide your name and contact information to that party, if the designee requests.

Required by Law: Trustate may disclose consumer information as required by law, such as in response to a subpoena, a lawful request by a public authority, including to meet national security or law enforcement requirements, or similar legal process, and when we believe in good faith that disclosure is necessary to protect our rights, protect your safety or the safety of others, investigate fraud, or respond to a legal request.

Related Parties: Trustate may disclose consumer information with businesses controlling, controlled by, or under common control with Trustate. If Trustate is merged, acquired, or sold, or if some or all of our assets or equity are transferred, we may disclose or transfer consumer data in connection with the associated transactions.

In addition to the circumstances listed above, Trustate may also share de-identified or aggregate data that is not capable of being linked to any individual consumer with additional entities not listed above.

Summary of Trustate’s Practices Regarding Consumer Information.

The following chart summarizes where Trustate collects each category of information listed above, and how Trustate shares each category of data. Trustate may use each of the categories of information collected for the purposes described in the section above, entitled “How We Use the Information We Collect About Consumers.”

Category of Information	Where We Collect the Information	Who We Share the Information With
Identifiers	Consumers, Related Consumers, Employers, Service Providers, Professionals, Business Partners, Publicly Available, Unrelated Parties	Service Providers, Professionals, Business Partners, Employers, Government Entities, Public, Registered Agents, Required by Law, Related Parties
Other	Consumers, Related Consumers, Employers, Service Providers, Professionals, Business Partners, Publicly Available, Unrelated Parties	Service Providers, Professionals, Business Partners, Employers, Government Entities, Registered Agents, Required by Law, Related Parties
Protected Characteristics	Consumers, Related Consumers, Employers, Service Providers, Professionals, Unrelated Parties	Service Providers, Professionals, Business Partners, Government Entities, Public, Required by Law, Related Parties
Commercial	Consumers, Related Consumers, Service Providers, Professionals, Business Partners, Unrelated Parties	Service Providers, Professionals, Business Partners, Employers, Government Entities, Public, Required by Law, Related Parties
Internet	Consumers, Service Providers	Service Providers, Business Partners, Required by Law, Related Parties

Geolocation	Consumers, Related Consumers, Employers, Service Providers, Professionals, Business Partners, Publicly Available, Unrelated Parties	Service Providers, Professionals, Business Partners, Government Entities, Public, Registered Agents, Required by Law, Related Parties
Audio/visual	Consumers	Service Providers, Required by Law, Related Parties
Professional/employment	Consumers, Related Consumers, Employers, Publicly Available, Unrelated Parties	Service Providers, Professionals, Business Partners, Government Entities, Public, Required by Law, Related Parties

How Trustate Uses Cookies and Similar Technologies.

This section expands on how Trustate uses internet technologies, such as cookies, to collect information about consumers.

Cookies. Trustate and its partners may use the standard cookie feature of major browser applications and third-party service providers, including Google Analytics features (Remarketing, Google Display Network Impression Reporting, the DoubleClick Campaign Manager Integration and Google Analytics Demographics and Interest Reporting), or employ internally developed cookies and tracking codes, that allow Trustate to store a small piece of data on a visitor's computer, or any other device a visitor uses to access our website, about his or her visit to the website or use of other plug-ins exchanging information with Trustate. We also use similar technologies, such as JavaScripts or ETags, to analyze trends, administer the website, track users' movements around the website, and to gather demographic information about our user base as a whole. You can remove persistent cookies by following directions provided in your Internet browser's "help" directory.

You may also control which cookies are placed on your browser when you visit Trustate's website through our cookie preference center. If you reject cookies, you may still use our site, but your ability to use some areas of our site, such order forms, will be limited.

Cookies Settings

3rd Party Tracking. The use of tracking technologies by our service providers, technology partners or other 3rd party assets (such as social media links) on the site is not covered by our Privacy Policy. These 3rd parties may use cookies, clear gifs, images, and scripts to help them better manage their content on our site. We do not have access or control over these technologies.

Partner and Affiliate Tracking. Our partners and affiliates, including Google Analytics (Remarketing, Google Display Network Impression Reporting, the DoubleClick Campaign Manager Integration, and Google Analytics and Interest Reporting), may use cookies and web beacons to collect information about your activities on this and other websites to provide you targeted advertising based upon your interests. This means that these partners and affiliates may show our ads on sites across the Internet based upon your previous visits to our website. Together with our partners and affiliates, we may use these cookies and web beacons to report how your ad impressions, other uses of ad services, and interactions with these ad impressions and ad services are related to your visits to our site.

If you would like to learn more or opt out of receiving online display advertising tailored to your interests, please visit the Networking Advertising Initiative at www.networkadvertising.org/managing/opt_out.asp or the Digital Advertising Alliance at <http://aboutads.info/choices>. If you delete your cookies, use a different browser, or buy a new computer, you will need to renew your online display advertising opt-out choice. You may also learn more about how Google Analytics uses your information by visiting Google's page [How Google Uses Information From Sites or Apps That Use Our Service](#). You may also visit Google Analytics' [Ads Settings](#) to opt out of Google's use of cookies and customize Google Display Network ads, and Google Analytics' [Opt Out Browser Add-on for the web](#).

Third Party Links

Third-Party Websites. Trustate may maintain links to other websites and other websites may maintain links to Trustate's websites. This Privacy Policy applies only to Trustate.com and not to other websites accessible from Trustate or that you use to access Trustate, each of which may have privacy policies materially different from this Privacy Policy. If you visit other websites, Trustate is not responsible for the privacy practices or content of those sites. It is your responsibility to review the privacy policies of non-Trustate websites to confirm that you understand and agree with them.

Social Media Widgets. Our website includes social media features, such as the Facebook "like" button and widgets, such as the "Share this" button or interactive mini-programs that run on our site. These features may collect your IP address, which page you are visiting on our site, and may set a cookie to enable the feature to function properly. Social media features and widgets are either hosted by a third party or hosted directly on our website. Your interactions with these features are governed by the privacy policy of the company providing it.

How You Can Control The Information Trustate May Have About You.

This section describes how you can access and control the information that Trustate may have about you. It applies to all consumers worldwide, including individuals who have purchased from Trustate or who believe that information about them may have been provided to us by a third party. Depending on where you reside, you may have additional rights beyond what is described in this section.

Confirmation of Possession of Information Related to You. Upon a verified request, and subject to the privacy interests of others and technical limitations, Trustate will provide you with information about whether we hold any information related to you. At Trustate's sole discretion, unless otherwise required by law, we may in some instances correct or delete information upon a verified request. Please note, however, that in certain circumstances we may be required by law to retain your Personal Information, or may need to retain your Personal Information in order to continue providing a product or service to you or another customer.

User and Authorized Contact Access to Order Information. Trustate will give you, or anyone listed as an authorized contact for your account, information about your order. This may include information about the nature and status of your order, information you provided to process your order, payment information, and contact information. If you want someone to have access to your order, you must list him or her as an authorized contact or they may not obtain information. You can confirm who is listed as an authorized contact for your account, add new authorized contacts, or remove authorized contacts by clicking first on "My Account", and then on "Account Information". We may send a confirmation email to your authorized contact(s), alerting them that they have been added as an authorized contact. For some products, we may provide information about your order to other individuals named in the order, such as executors named in a last will. For product-specific information about who may request information about your order, please contact us at info@mytrustate.com.

User Access to and Ability to Update Personal Information through MyAccount. You may visit your personal account profile at any time by logging into the portal and clicking on the "My Account" link. Through My Account, you may review and update basic information about you.

Opting Out of Email. We send promotional emails and newsletters from time to time to consumers who have provided us with their email address or whose email addresses we have obtained through other sources. You can opt-out of promotional communications by using the "Unsubscribe" link and following the unsubscribe instructions in an email you receive from us or by emailing us at info@mytrustate.com. We may also send service-related or transactional communications, which are not promotional. Generally, you may not opt-out of these communications. If you do not wish to receive service-related communications, you may terminate your account by contacting us at info@mytrustate.com.

Data Retention. At minimum, we will retain your information for as long as needed to provide you services, and as necessary to comply with our legal obligations, resolve disputes, and enforce our agreements. Trustate may maintain some or all of this data in its archives even after it has been removed from the Site.

Information Processed On Behalf of Third Parties

In some instances, Trustate may process Personal Information on behalf of third party affiliates. Trustate acknowledges that in these instances, you have the right to access your Personal Information. Where Trustate has no direct relationship with the individuals whose Personal

Information it processes, individuals seeking access, or seeking to correct, amend, or delete inaccurate data, should direct their inquiry to the third party affiliate (the data controller).

How Secure Is the Personal Information We Collect?

Our Commitment to Data Security. We strive to make certain that our servers and connections incorporate the latest encryption and security devices. We have implemented physical, electronic, and managerial procedures to safeguard and secure the information we collect. Credit card and Personal Information are transmitted by secure servers (TLS). Documents are delivered to you via UPS or similar delivery services, the United States Postal Service, or electronically, including through online storage platforms or email. Unfortunately, no data transmission is guaranteed to be 100% secure and we therefore cannot guarantee the security of information you transmit to or from our website or through the use of our services, and you provide this information at your own risk. ACCORDINGLY, WE DISCLAIM LIABILITY FOR THE THEFT, LOSS, OR INTERCEPTION OF, OR UNAUTHORIZED ACCESS OR DAMAGE TO, YOUR DATA OR COMMUNICATIONS BY USING OUR WEBSITE AND OUR SERVICES. YOU ACKNOWLEDGE THAT YOU UNDERSTAND AND ASSUME THESE RISKS.

IF YOU BELIEVE YOUR PRIVACY HAS BEEN BREACHED PLEASE CONTACT US IMMEDIATELY BY EMAILING INFO@MYTRUSTATE.COM.

Enforcement. We periodically review this Privacy Policy and our compliance with it to verify that both are accurate. We encourage you to contact us with any concerns, and we will investigate and attempt to resolve any complaints and disputes about our privacy practices.

Information for California Residents.

If you are a resident of California, this section provides information regarding your rights, and Trustate's responsibilities, regarding your Personal Information.

California Resident Rights

California law allows California residents, upon a verifiable consumer request, to request that a business that collects consumers' Personal Information give consumers access to certain information. This includes the specific pieces and categories of Personal Information that the business has collected about the consumer, the categories of sources for that information, the business or commercial purposes for collecting the information, and the categories of third parties with which the information was shared.

California residents also have the right to submit a request for deletion of information under certain circumstances. This is not an absolute right and, in some circumstances, Trustate may decline to delete the information, such as when Trustate has an on-going business relationship with you, when we have a continued need to use the information for purposes outlined in this Privacy Policy, or when we are legally required to retain the information.

Consistent with California law, if you choose to exercise your rights, we will not charge you different prices or provide different quality of services unless those differences are related to your information.

How to Submit a Request for Access to Information or Deletion of Information

If you would like to submit a request about your data, we encourage you to submit a request by emailing info@mytrustate.com.

After you submit the request you will be asked to verify your email address and may also be asked to provide additional information in order to verify your identity, including potentially providing a declaration under penalty of perjury. Trustate will attempt to verify your identity by asking for information that correlates with the information that we have previously collected about you. Where this is not possible, Trustate may request you submit additional information for verification, such as proof of residency or redacted government-issued identification. Please note that consistent with California law, we will be unable to satisfy your request until we have verified your identity.

You may also designate an authorized agent to make a request on your behalf. In order to designate an authorized agent to make a request on your behalf, you must provide Trustate with written permission for the agent to make the request on your behalf or provide us with an executed power of attorney. You will also be required to submit your valid government issued-identification, and the authorized agent's valid government-issued identification.

Changes To This Policy.

We may update this privacy policy to reflect changes to our information practices. If we make any material changes, a notice will be posted on this page along with the updated Privacy Policy prior to the change becoming effective. We encourage you to review this page periodically for the latest information on our privacy practices.

If you have any questions regarding our Privacy Policy, please contact us by submitting your question to info@mytrustate.com or mailing us at the address below.

Mailing Address

Attn: Trustate Privacy Team
P.O. Box 7134
Ellicott City, MD 21042
info@mytrustate.com