

Nolan Financial Group Privacy Notice

Reviewed as of August 18, 2026

Protecting your privacy is fundamental to the way Nolan Financial Group (“Nolan Financial,” “we,” or “us”) conducts business. The purpose of this webpage is to inform you how we collect, use, and share the personal information we collect about you from your use of our websites, including nolanfinancial.com, nolanfinancialgroup.com, and nolanlink.com; mobile apps, if applicable; products and/or services (collectively, the “Services”); or when you otherwise interact with us or receive a communication from us.

Our Information Collecting Practices

For detailed information regarding our collection of personal information (i.e., why we collect it, how we use it, and your options for limiting our receipt of such personal information), please review this Privacy Notice. Please note that this Privacy Notice governs our processing of personal information for which we are a controller. We may also act as a processor or service provider on behalf of our business customers. For information regarding how our business customers process your personal information, please review their privacy policies or reach out to them directly.

This Privacy Notice applies to personal information collected through Nolan Financial websites and online services, including nolanfinancial.com, nolanfinancialgroup.com, and nolanlink.com, as well as any related client portals, digital communications, or online tools that link to or reference this notice.

Note that we never sell your personal information. We also do not disclose your personal information unless permitted or required by law or contract.

Exercising Your Privacy Rights

Depending on where you live in the United States, you may have the following rights with respect to your personal information under applicable data protection laws:

- **Access** – The right to request access to and obtain a copy of any personal information we may have about you. You may also have the right to know the categories of third parties to which we have disclosed personal information.
- **Deletion** – The right to delete your personal information that we have collected or obtained, subject to certain exceptions.
- **Correction** – The right to request that we correct any inaccuracies in your personal information, subject to certain exceptions.
- **Opt Out of Certain Processing** – The right to: (a) opt out of the processing of your personal information for purposes of targeted advertising, (b) opt out of the sale or sharing of your personal information; (c) limit the use of your sensitive personal

information (if applicable), and (d) opt out of profiling in furtherance of decisions that produce legal or similarly significant effects. We do not collect or process sensitive personal information outside of purposes permitted by law (such as section 7027(m) under the California Consumer Privacy Act Regulations), so we do not offer the option to limit its use. To the extent we profile you, we do so to meet our legal obligations under applicable financial laws and regulations (i.e., know your customer requirements).

To exercise any of the privacy rights afforded to you under applicable data protection laws, e-mail us at privacy@nolanfinancial.com or call us at 301-907-9500. Please note that depending on the nature of the services we offer to you, you may also access your personal information by logging into your existing account profile within the applicable secure portal, which enables you to view your account balance and other associated personal information. Again, note that in many cases we only serve as a processor or service provider to you on behalf of our business customers. In such cases, you may need to reach out to them directly to exercise your privacy rights.

You will not be discriminated against in any way by virtue of your exercise of the rights set forth above. However, should you withdraw your consent or object to processing of your personal information, or if you choose not to provide certain personal information, we may be unable to provide some, or all, of our services to you.

Only you, or an authorized agent that you authorize to act on your behalf, may make a request related to your personal information. We must verify your identity before fulfilling your requests, and if we cannot verify your identity, we may request additional information from you. If you are an authorized agent making a request on behalf of another person, we will also need to verify your identity, which may require proof of your written authorization or evidence of a power of attorney. We endeavor to respond to requests within the time period required by applicable law. If we require more time, we will inform you of the reason and extension period in writing.

We do not charge a fee to process or respond to your requests unless they are excessive or repetitive. If we determine that a request warrants a fee, we will tell you why we made that decision and provide you with a cost estimate before completing your request. We may deny certain requests, or only fulfill some in part, as permitted or required by law. If you are not satisfied with the resolution of your request and you are afforded a right to appeal such decision, you will be notified of our appeal process in our response to your request.

California Residents

This section provides additional information regarding Nolan Financial's practices pursuant to the California Consumer Privacy Act of 2018 and its implementing regulations, as

amended by the California Privacy Rights Act (“**CCPA**”), where “**Personal Information**” has the definition set forth in the CCPA.

Please see below for detailed information about the categories of Personal Information we may have collected from California residents during the twelve months preceding the date on which this notice was last updated and the categories of third parties to whom we share Personal Information.

We may collect the following categories of Personal Information:

- Personal Identifiers - A name, signature, Social Security number, physical characteristics or description, address, telephone number, passport number, driver's license or state identification card number, insurance policy number, employment history, or financial information. Some personal information included in this category may overlap with other categories (California Customer Records Personal Information (Cal. Civ. Code § 1798.80(e)).
- California Customer Records Personal Information (Cal. Civ. Code § 1798.80(e)) - A name, signature, Social Security number, physical characteristics or description, address, telephone number, passport number, driver's license or state identification card number, insurance policy number, education, employment history, or financial information. Some personal information included in this category may overlap with other categories.
- Characteristics of protected classifications - Age (40 years or older), race, color, ancestry, national origin, citizenship, religion or creed, marital status, medical condition, physical or mental disability, sex (including gender, gender identity, gender expression, pregnancy or childbirth and related medical conditions), sexual orientation, veteran or military status, genetic information (including familial genetic information).
- Commercial information - Records of products or services purchased, obtained, or considered, or other purchasing or consuming histories or tendencies.
- Internet and other electronic network activity information - Browsing history, search history, information on a consumer's interaction with a website, application, or advertisement.
- Geolocation data.
- Professional or Employment Related Information - Current or past job history; employer names and addresses.
- Inferences drawn from other personal information, which may include person's preferences, characteristics, and predispositions.

- Sensitive Personal Information as set forth in Cal. Civ. Code § 1798.140 - Social security, driver's license, state identification card, or passport number; account log-in, financial account, in combination with any required security or access code, password, or credentials allowing access to an account; union membership; contents of a consumer's mail, email, and text messages.

We do “share” the following categories of Personal Information with third-party marketers, analytics providers and other third parties that set cookies and other online tracking technologies on our website.

- Personal Identifiers - A name, e-mail. Some personal information included in this category may overlap with other categories (California Customer Records Personal Information (Cal. Civ. Code § 1798.80(e)).
- Internet and other electronic network activity information - Browsing history, search history, information on a consumer's interaction with a website, application, or advertisement.
- Geolocation data.

Contact Directory

Nolan Financial appreciates your business and strives to provide an enhanced customer service experience. For privacy related questions, please use one of the following contact methods:

General Privacy Related Inquiries:

- For general questions regarding Nolan Financial Privacy policies, please contact us through one of the following means:
- Email address: privacy@nolanfinancial.com
- Regular Mail: 6720-B Rockledge Drive, Suite 600B Bethesda, MD 20817 Attn: Compliance Department
- Telephone: 301-907-9500

Specific Privacy Related Inquiries:

- For specific questions regarding a particular financial product, please contact us by telephone at the number displayed on the Contact Us page or at the number located on your plan documents or account statements.
- For any questions regarding your rights under a particular state's laws, please contact us through the methods described above.

Note: To help assure your personal information is kept confidential, we require that you identify yourself when calling by providing specific information, such as your account information and other identifying information.

Changes to Our Privacy Notices

We reserve the right to amend this privacy notice at any time at our discretion. When we make material changes to this privacy statement, we will notify you through a notice on our websites, including nolanfinancial.com, nolanfinancialgroup.com, and/or nolanlink.com, or as otherwise required by applicable law.

Nolan Financial provides financial services and related support. The information contained herein is general in nature and is not intended to address the circumstances of any particular individual or entity. Please consult with your tax, accounting, investment, or legal advisors before making decisions.

By using our websites, including nolanfinancial.com, nolanfinancialgroup.com, and nolanlink.com, interacting with us on social media, or communicating with us via email or other electronic messages (“Digital Presence”), you consent to the collection, use, and storage of your personal and non-personal information as described in this Privacy Notice and any applicable Terms & Conditions of Use. We may amend this notice from time to time; if we do, we will post those changes on the applicable website within a reasonable time after the change so that you are aware of what information we collect and how we intend to use it.

Depending on your interaction with Nolan Financial, other privacy policies or notices may apply in addition to this notice. The information contained herein is general in nature and is not intended to address the circumstances of any particular individual or entity. Please consult with your tax, accounting, investment, or legal advisors before making decisions.

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