## **PRIVACY POLICY**

MyEstatePlanUSA.com, LLC., ("MyEstatePlanUSA" "We", "Us") is sensitive to your concerns about how we use the personal information we collect from you through MyEstatePlanUSA's website (the "Site") and other plug-ins exchanging information with MyEstatePlanUSA ("Applications"). (The Site and Applications are sometimes collectively referred to as "Online Services" for simplicity.) MyEstatePlanUSA takes your privacy seriously, and has implemented this privacy policy (the "Privacy Policy") and internal policies and practices to keep your personal and financial information secure. The Privacy Policy covers MyEstatePlanUSA's treatment of the Personally Identifiable Information we collect when you use the Online Services. It also describes the choices available to you regarding our use of your personal information and how you can access and update this information.

This Privacy Policy is incorporated into our Terms and Conditions, and therefore governs your use of the Online Services.

## \*By using MyEstatePlanUSA Online Services, you accept the terms of this Privacy Policy.

*If you have questions, concerns or complaints regarding our privacy policy or practices, please contact us at* **customercare@MyEstatePlanUSA.com.** 

## What Information Do We Collect About Our Customers?

Traffic Data. MyEstatePlanUSA may collect a variety of visitor data such as IP addresses, browser settings, internet service provider (ISP) information, referring/exit pages, operating systems, date/time stamps, and clickstream data (collectively "Visitor Data"). MyEstatePlanUSA's servers and software automatically recognize Visitor Data. No Personally Identifiable Information is collected in this process The Site may use Visitor Data to compile traffic data about the types of visitors who use the Site at specific intervals (collectively "Traffic Data").

We may use Traffic Data to analyze Site traffic, but this information is not examined for Personally Identifiable Information. We may also use Traffic Data to diagnose problems with our server, administer our Site, or display content according to your preferences. Visitor Data and Traffic Data may also be shared with business partners, affiliates, or advertisers on an aggregated and anonymous basis.

Cookies. MyEstatePlanUSA may use the standard cookie feature of major browser applications and third-party 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 MyEstatePlanUSA to store a small piece of data on a visitor's computer, or any other device a visitor uses to access Online Services, about his or her visit to the Site or use of Applications. MyEstatePlanUSA does not capture Personally Identifiable Information in cookies or use cookies to mine Personally Identifiable Information. You can remove persistent cookies by following directions provided in your Internet browser's "help" directory. If you reject cookies, you may still use our site, but your ability to use some areas of our site, such as order forms, will be limited.

Web Beacons. We employ a software technology called clear gifs (a.k.a. web beacons), that help us track referrals from our partners and affiliates and better manage content on our site. Clear gifs are tiny graphics with a unique identifier, similar in function to cookies, and are used to track the online movements of web users. In contrast to cookies, which are stored on a user's computer hard drive, clear gifs are embedded invisibly on web pages and are about the size of the period at the end of this sentence. We do not tie the information gathered by clear gifs to our customers' Personally Identifiable Information.

3<sup>rd</sup> 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. We do not tie the information gathered to our Customers' or Users' Personally Identifiable Information.

Personal Information. MyEstatePlanUSA requires each customer to provide us with personal information (collectively "Personally Identifiable Information") to access and use MyEstatePlanUSA products and services. Personally Identifiable Information is captured only when a visitor accesses Online Services, or speaks on the phone with a MyEstatePlanUSA employee, and willingly discloses that information. This disclosure may occur when a visitor registers with the Online Service, engages in transactions, contacts customer service, or participates in contests, promotions, surveys, forums, content submissions, requests for suggestions, or other aspects of services offered by MyEstatePlanUSA.

Personally Identifiable Information includes: (1) "Contact Data" (such as your name, address, city, state, zip code, phone number, and email address); (2) "Financial Data" (such as your credit card number, expiration date, and verification code or bank account information); (3) "Demographic Data" (such as your zip code and sex); and (4) other "Legal Data" (such as your social security number, mortgage information, automobile information, marital information, trade secrets, inventions, and idea submissions and other sensitive information necessary to generate legal documents).

We may collect the information of 3rd party individuals as necessary, such as to ask our customers to indicate beneficiaries of a will, record shareholders of a company, or register authorized contacts to access their MyEstatePlanUSA account. MyEstatePlanUSA uses this information for the sole purpose of administering its services for our customers, and does not use such information for any other reason.

Certain personal information becomes public record when documents are filed with the federal or state government, or with a court. For example, a Real Property transfer deed is public record when filed at your local County Recorder. The MyEstatePlanUSA Privacy Policy does not cover this transfer or similar third-party actions.

Calls/Electronic Communications. In the regular course of our business MyEstatePlanUSA may monitor and record phone conversations or email communications between you and MyEstatePlanUSA employees for training and quality assurance purposes. We may receive a confirmation when you open or click on content in an email from us, which helps us make our communications to you more useful and interesting. If you do not wish to receive email from MyEstatePlanUSA, you may unsubscribe from our mailing list on any of the emails we send.

## How Do We Use the Information We Collect and Do We Share the Information We Receive?

We use information we collect from the Online Services to communicate with you, process your orders, facilitate your transactions with our third-party marketing partners, and inform you of offers and discounts. We occasionally send service-related announcements, for example, to alert you if we need to temporarily suspend the Site for maintenance.

Opting Out. We send promotional emails and newsletters from time to time to users who have registered on the site and to those who have opted in to receive such emails. Generally, you may not opt-out of service-related or transactional communications, which are not promotional. If you do

not wish to receive service-related communications, you may terminate your account by contacting Customer Care at <u>customercare@myestateplanusa.com</u>. However, you can opt-out of promotional communications by following the unsubscribe instructions in any communication or by emailing us at customercare@myestateplanusa.com.

You may choose not to provide MyEstatePlanUSA with Personally Identifiable Information or you may turn off cookies in your browser by changing its settings. If you make these decisions, you may continue to use the Online Services and browse its pages. However, MyEstatePlanUSA cannot process orders without Personally Identifiable Information.

Surveys, Sweepstakes, and Contests. We may provide you the opportunity to participate in surveys on our site, to measure customer satisfaction. If you participate, we may request certain personally identifiable information from you. Participation in these surveys, sweepstakes, or contests is completely voluntary and you therefore have a choice whether or not to disclose this information. The requested information typically includes name, email address, and mailing address.

We share customer information with third parties only as follows:

Order Processing. MyEstatePlanUSA, sometimes with the assistance of a third party or MyEstatePlanUSA subsidiary, may use your Personally Identifiable Information to process your payment through merchant account services, and to generate the products and services you order. Your Contact Data may be used to follow up with you on transactions you initiate through Online Services, respond to inquiries made through Online Services, inform you of changes to Online Services, and send you additional information about MyEstatePlanUSA and its products and services.

Third Party Marketing. Unless specifically authorized by you, we do not provide Personally Identifiable Information to third parties for marketing purposes. If you express interest in a third party offer or purchase a package that includes a third party offer, we may provide your Personally Identifiable Information to that third party solely in connection with the offer you have selected.

Required by Law. We may also disclose your personal information: as required by law, such as in response to a subpoena 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.

Visitor Demographics. Contact Data and Traffic Data are used to gather general statistics about our customers and visitors. We may use Demographic Data to generate collective information about our users, but not in a way that identifies any user specifically. For example, we may inform third parties about the number of registered users and unique visitors, and the pages most frequently browsed.

Estate Planning Attorneys and Attorney-Assisted Products. As a convenience to you and your attorney, we may share your Personally Identifiable Information, information about your order, and your order history with your estate planning attorneys and with attorneys who service our attorney-assisted products. We will notify you prior to sharing this information and, where the information is not necessary to complete your order, give you the opportunity to opt-out.

Service Providers. We may share your Personally Identifiable Information with companies that provide support services to us (such as a printer or email service provider), or help us market our products and services. These companies may need information about you in order to perform their functions. These companies are not authorized to use the information we share with them for any other purpose.

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 non-personally identifiable 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 site. 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 <u>www.networkadvertising.org/managing/opt\_out.asp</u> or the Digital Advertising Alliance at <u>http://aboutads.info/choices</u>. 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 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.

**Other Transfers.** We may share Personally Identifiable Information and other data with businesses controlling, controlled by, or under common control with MyEstatePlanUSA. If MyEstatePlanUSA is merged, acquired, or sold, or if some or all of our assets or equity are transferred, we may disclose or transfer Personally Identifiable Information and other data in connection with the associated transactions.

**Bankruptcy.** In the event of a MyEstatePlanUSA bankruptcy, insolvency, reorganization, receivership, or assignment for the benefit of creditors, or the application of laws or equitable principles affecting creditors' rights generally, we may not be able to control how your personal information is treated, transferred, or used. If such an event occurs, your Personally Identifiable Information may be treated like any other MyEstatePlanUSA 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.

## Links

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

maintain some or all of this data in its archives even after it has been removed from the Site.

# 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 (SSL). Documents are delivered

to you via UPS or similar overnight delivery services, the United States Postal Service, 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 the Site, Applications, 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 the site, applications, and our services. You acknowledge that you understand and assume these risks.

If you believe your privacy has been compromised through the use of our website, applications or other services please contact us immediately at customercare@myestateplanusa.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.

**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 periodically review this page for the latest information on our privacy practices.

Contact Us. If you have any questions regarding our Privacy Policy, please contact us at:

#### **Mailing Address**

67 S. Higley Road, Suite 103-216, Gilbert, AZ. 85296,

or

customercare@myestateplanusa.com

#### Privacy Policy Revision History- Last updated on March 1, 2015

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Disclaimer. Communications between you and MyEstatePlanUSA.com are protected by our Privacy Policy but not by the attorney-client privilege or as work product. MyEstatePlanUSA provides access to independent attorneys and self-help services at your specific direction. We are not a law firm or a substitute for an attorney or law firm. We cannot provide any kind of advice, explanation, opinion, or recommendation about possible legal rights, remedies, defenses, options, selection of forms or strategies. Your access to the website is subject to our Terms and Conditions.