

## PRIVACY NOTICE



**INVST LLC (referred to as the "Firm")** has physical, electronic, and procedural safeguards that meet federal standards to protect its clients' nonpublic personal information ("Information"). This policy and its procedures aim to ensure the confidentiality of customer records and information while guarding against potential threats to their security or integrity.

The Firm's policy is to limit access to all current and former clients' Information (*i.e., personal background, investment goals, financial status, tax details, investment holdings, account numbers, account balances, etc.*) to employees and affiliated or non-affiliated entities who need to know this Information to provide products and/or services related to the client's engagement with the Firm. In this context, the Firm may share the client's Information: (1) with individuals or entities not affiliated with the Firm, such as the client's other professional advisors or certain service providers recommended by the Firm (*e.g., attorneys, accountants, insurance agents, broker-dealers, investment advisers, account custodians, record keepers, proxy management service providers, etc.*); (2) as required by judicial or regulatory processes; or (3) as allowed under applicable federal and/or state privacy regulations.

The Information in any document completed by the client for processing or transmission by the Firm to support the start, continuation, or termination of a business relationship between the client and/or the Firm and a non-affiliated third-party service provider (*e.g., broker-dealers, investment advisers, account custodians, record keepers, insurance agents, etc.*) may also be disclosed.

The Firm allows only authorized employees and affiliates who have signed the Firm's Privacy Policy to access client Information. Employees who breach the Firm's Privacy Policy will face disciplinary action from the Firm. Furthermore, when the Firm engages other service providers or organizations to serve its clients, it will mandate that they sign confidentiality agreements and/or the Privacy Policy.

**Should you have any questions or concerns regarding the above, please contact:**

**Beverly Blair**  
*Chief Compliance Officer*  
**beverly@invst.com / (203) 850-7193**

*March 31, 2026*