Privacy Policy

How Q3 Advisors collects, uses, and protects your personal information

At Q3 Advisors, protecting your privacy is of utmost importance to us. We understand that the trust you place in us is central to our mission of providing exceptional financial planning and advisory services. This privacy policy outlines how we handle your personal information and our commitment to safeguarding your privacy.

01 Information We Collect

In the course of providing our services, we may collect the following types of personal information:

- Personal Identification Information: Name, address, phone number, email address, birth date and other contact details.
- Financial Information: Details about your financial situation, investment history, tax status, income, net worth and other relevant data necessary for providing financial planning and advisory services.

02 How We Use Your Information

We use the information we collect to:

- Provide, maintain, and improve our financial planning and advisory services.
- Communicate with you about the services we are providing.
- Comply with legal and regulatory requirements.

03 Protecting Your Information

We employ a variety of security measures to ensure the confidentiality and integrity of your personal information. These measures include:

- Encryption: We use encryption to protect sensitive information transmitted online.
- Access Controls: Access to personal information is restricted to authorized personnel only.
- Physical Security: Our data storage systems are protected against unauthorized access.

04 Sharing Your Information

Q3 Advisors does not sell your personal information to third parties. We will share your information with third parties only under the following circumstances:

- Service Providers: We share information with trusted service providers who assist us in operating our business, provided they agree to keep your information confidential.
- We will disclose information as required by law or to comply with regulatory authorities who regulate our activities.
- Otherwise, With Your Consent: We will only share personal and financial information with your written consent.

No mobile information will be shared with third parties or affiliates for marketing or promotional purposes. Text messaging opt-in data and consent are not shared with any third parties.

THIRD-PARTY DATA SHARING

To effect certain of our services, Q3 Advisors has contracted with Plaid Inc. (“Plaid”) to gather your data from financial institutions. You grant us the right, power, and authority to act on your behalf to access and transmit your personal and financial information from your relevant financial institution. You agree to your personal and financial information being transferred, stored, and processed by Plaid.

Plaid Inc.’s Privacy Policy can be accessed via plaid.com/legal/#end-user-privacy-policy.

05 Your Choices

You have the right to:

- Access and update your personal information.
- Request the deletion of your personal information, subject to legal and contractual obligations.
- Opt-out of receiving marketing communications from us.

06 Changes to Our Privacy Policy

Q3 Advisors reserves the right to update this privacy policy at any time. Any changes will be posted on our website, and we will notify you of significant changes through email or other means.

07 Contact Us

If you have any questions or concerns about our privacy policy, please contact us at:

Q3 Advisors

cw@craigwear.com

7314 Ralston Road, Arvada, CO 80002

Your trust and confidence are important to us, and we are committed to protecting your privacy. Thank you for choosing Q3 Advisors for your financial planning and advisory needs.