

**FACTS****WHAT DOES ICON FINANCIAL SERVICES DO WITH YOUR PERSONAL INFORMATION?**

<b>Why?</b>	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
<b>What?</b>	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> <li>■ Social Security number and Net Worth</li> <li>■ Account Balances and Account Transactions</li> <li>■ Transaction History and Bank Account Information</li> </ul>
<b>How?</b>	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons Icon chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Icon share?	Can you limit this sharing?
<b>For our everyday business purposes—</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	YES	NO
<b>For our marketing purposes—</b> to offer our products and services to you	YES	NO
<b>For joint marketing with other financial companies</b>	YES	NO
<b>For our affiliates' everyday business purposes—</b> information about your transactions and experiences	YES	NO
<b>For our affiliates' everyday business purposes—</b> information about your creditworthiness	NO	We don't share
<b>For our affiliates to market to you</b>	NO	We don't share
<b>For nonaffiliates to market to you</b>	NO	We don't share

<b>To limit our sharing</b>	<ul style="list-style-type: none"> <li>■ Call 503-917-0590—our menu will prompt you through your choice(s)</li> <li>■ Visit us online: <a href="http://www.iconsavingsplan.com">www.iconsavingsplan.com</a> or</li> <li>■ Mail the <b>form</b> below</li> </ul> <p><b>Please note:</b></p> <p>If you are a <i>new</i> customer, we can begin sharing your information [30] days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p> <p>However, you can contact us at any time to limit our sharing.</p>
-----------------------------	--

<b>Questions?</b>	Call 503-917-0590 or go to <a href="http://www.iconsavingsplan.com">www.iconsavingsplan.com</a>
-------------------	---

**Mail-in Form**

<b>Leave Blank OR</b> [If you have a joint account, your choice(s) will apply to everyone on your account unless you mark below.  <input type="checkbox"/> Apply my choices only to me]	Mark any/all you want to limit: <ul style="list-style-type: none"> <li><input type="checkbox"/> Do not share information about my creditworthiness with your affiliates for their everyday business purposes.</li> <li><input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me.</li> <li><input type="checkbox"/> Do not share my personal information with nonaffiliates to market their products and services to me.</li> </ul>		
	<b>Name</b>		<b>Mail to:</b> Icon Financial Services 2443 Fillmore St San Francisco, CA 94115
	<b>Address</b>		
	<b>City, State, Zip</b>		
	<b>[Account #]</b>		

## Who we are

### Who is providing this notice?

This privacy notice is provided by Icon Savings Plan (“Icon”) and Icon Financial Services LLC (“Icon Financial”).

## What we do

### How does Icon protect my personal information?

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured file servers.

### How does Icon collect my personal information?

We collect your personal information, for example, when you:

- Open an account or deposit money;
- Provide account information or give us your contact information; or
- Show your government issued ID

### Why can't I limit all sharing?

Federal law gives you the right to limit only

- sharing for affiliates' everyday business purposes—information about your creditworthiness
- affiliates from using your information to market to you
- sharing for nonaffiliates to market to you

State laws and individual companies may give you additional rights to limit sharing.

## Definitions

### Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- *Icon Savings Plan & Icon Financial Services*

### Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- *We do not share with nonaffiliates so they can market to you*

### Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- *Our joint marketing partners include other financial institutions*

## Other important information

For California Customers. We will not share information we collect about you with companies outside of Stash Financial, Inc., unless the law allows. For example, we may share information with your consent, or to service your accounts. We will limit sharing among our companies to the extent required by California law.

