

PRIVACY POLICY

Effective as of 08/07/2025

Wealthdoor Asset Management LLC dba Nestvst, welcomes you. We refer to Wealthdoor Asset Management LLC dba Nestvst as “Nestvst” in this Privacy Policy (“Privacy Policy”), which applies to Nestvst and any other companies that we control, we are controlled by, or with whom we are under common control (the “affiliates”).

We at Nestvst respect your rights to privacy, and we created this privacy policy (“Policy”) to explain how we collect, use, protect, and disclose information and data.

This Privacy Policy relates to the information collection and use practices of Nestvst in connection with our delivery of Nestvst services (collectively, the “Services”) or our sale, advertising and marketing of the Services. Our Services are or will be available to you through a variety of means, including, but not limited to, our software applications for mobile devices (collectively, the “App”), our website located at www.nestvst.com or other websites (collectively, the “Website”), or messaging applications, including SMS and MMS, owned or operated by Nestvst (collectively with the App and the Website, the “Platform”).

Description of Users and Acceptance of Terms

This Privacy Policy applies to visitors to the Platform who view only publicly available content (the “Visitors”) and Clients who have signed up to access and use the Services offered by Nestvst through the Platform (the “Clients”).

By visiting or browsing the publicly accessible areas of the Platform, Visitors are acknowledging that they have read, understood, and agree to be legally bound by this Privacy Policy and our Terms of Use, which can be found at www.nestvst.com/termsfuse and are incorporated herein by this reference. If you do not agree to all of the terms in this Privacy Policy and the Terms of Use, you may not access or use the Website or the App.

By signing up, accessing, or using our Services, each Client is agreeing to the terms of this Privacy Policy and the Terms of Use, among other agreements.

Information We Collect or Receive

In the course of operating the Platform and providing the Services, we collect or receive the following types of information:

1. Personal Information

When you register to become a Client, you will be asked to provide us with certain information about you, such as, your name, date of birth, Tax ID number, citizenship, visa information, home address, telephone number, email address, bank account number, bank routing number, bank account login credentials, bank name, employer name, employment status, job position, whether you are a “politically exposed person,” whether you are a “control person” (pursuant to FINRA Rule 3210), annual income range, total net worth range, and other information as appropriate for our legitimate business needs (collectively and together with information referenced in Sections 2-6 below, the “Personal Information”). Personal Information on every application for an account is entitled to privacy, even if the application is not approved.

We may also collect Personal Information when you voluntarily provide us with Personal Information as a Visitor, such as when you use our “Contact” form.

2. Nonpublic Personal Information

When you register to become a Client and at certain times following initial registration during the provision of our Services to you, we will also collect your nonpublic personal information which means (i) any information you provide to us to obtain a financial product or service from us, (ii) any information about you resulting from any transaction involving a financial product or service between us and you, or (iii) any information we otherwise obtain about you in connection with providing a financial product or service to you (“Nonpublic Personal Information” or “NPI”). NPI is a subset of Personal Information and shall be considered Personal Information under this Privacy Policy. We collect Nonpublic Personal Information from Visitors who communicate with us for the purpose of becoming consumers of our Platform.

3. Initial Questionnaire Information

When you register as a Client, you will be asked to provide information about yourself such as, your name, age, etc., (collectively, the “Initial Questionnaire Information”). Initial Questionnaire Information may be updated or modified following initial registration during the provision of our Services to you. Initial Questionnaire Information is a subset of Personal Information and shall be considered Personal Information under this Privacy Policy.

4. Card and Bank Information

Certain features of the Services will allow you to link your bank account(s), credit card, and debit card to your Nestvst account(s) by providing your account number, billing address and similar information (collectively, the “Card and Bank Information”). Card and Bank Information may be collected and processed by one or more third parties pursuant to the terms and conditions of their respective privacy policies and terms of use. Card and Bank Information is a subset of Personal Information and shall be considered Personal Information under this Privacy Policy. To the extent that Nestvst stores your Card and Bank Information and uses it as set forth in this Privacy Policy.

5. Transaction Information

When Clients wish to make an investment or any other transaction through the Platform, they must provide us with certain information about the transaction they are seeking to execute. Such information is collectively called the “Transaction Information.” Transaction Information is a subset of Personal Information and shall be considered Personal Information under this Privacy Policy.

6. Geolocational Information

Certain features and functionalities of the Services may be based on your location. In order to provide these features and functionalities while you are using a mobile device, we may, with your consent, automatically collect geolocation information from your mobile device, wireless carrier, or certain thirdparty service providers. Such information is collectively called the “Geolocational Information.” Collection of such Geolocational Information occurs only when the App is running on your mobile device. You may decline to allow us to collect such Geolocational Information, in which case Nestvst will not be able to provide certain features or functionalities to you.

7. Digitized Information of Various Kinds.

We may automatically collect or receive additional information about you, your use of our Platform, your interactions with us and our advertising, as well as information regarding your computer or other devices used to access our Platform (collectively, the “Other Information”). Such Other Information may include, but is not limited to, the following:

A. From Your Activity

- IP address, which may consist of a static or dynamic IP address and will sometimes point to a specific identifiable computer or device;
- Browser type and language;
- Referring and exit pages and URLs;
- Date and time; and
- Details regarding your activity on the Platform, such as search queries and other performance and usage data.

B. About Your Device

- Type of device;
- Universally Unique Identifier (“UUID”);
- Advertising Identifier (“IDFA” or “AdID”);
- Operating system and version (e.g., iOS, Android or Windows);
- Wireless carrier; and
- Network type (WiFi, 3G, 4G, or LTE).

C. From Cookies, Web Beacons, and Other Similar Tracking Techniques

In operating the Website, we may also use data collection and tracking tools such as web beacons, pixel tags, embedded links, cookies, and other similar tracking techniques. A cookie is a piece of information that the computer that hosts our Website gives to your browser when you access the Website. Our cookies help provide additional functionality to the Website and help us analyze the Website’s usage more accurately. For example, our Website may set a cookie on your browser that allows you to access the Website without needing to remember and then enter a password more than once during a visit to the Platform.

On most web browsers, you will find a “help” section on the toolbar. Please refer to this section for information on how to receive notification when you are receiving a new cookie and how to turn cookies off. If you choose to disable cookies in your browser, you can still use the Website although your ability to use some of the features may be affected.

Our App and Website do not respond to “Do Not Track” signals or other similar mechanisms.

D. Third-Party Analytics

We may use third-party analytics services (for example, we may use Google Analytics, and others) to evaluate your use of the Platform, compile reports on activity, analyze performance metrics, and collect and evaluate other information relating to the Platform and mobile and Internet usage. These third parties use cookies and other technologies to help analyze and provide us the data. You consent to the processing of data about you by these analytics providers in the manner and for the purposes set out in this Privacy Policy. For more information on these third parties, including how to opt out from certain data

collection, please visit <https://www.google.com/analytics>. Please be advised that if you opt out of any service, you may not be able to use the full functionality of the Platform.

8. Surveys

We may, from time to time, ask you to participate in surveys. Participation in these surveys is completely voluntary. These surveys may be conducted by our third-party service providers. Such third-party service providers are authorized to use your information only as necessary to provide these services to us. We will use survey results to continue to improve the Platform and the Services. We will use your personal information from our surveys to send you information about our services and about third-party products and services. We may combine your survey information with other data we have about you. We may also anonymize and aggregate the survey information and sell it to third parties.

9. Information Collected by or Received from Third-Party Sources

We may also collect Personal Information and information about your transactions with us and those you engage in with our affiliates, unaffiliated third parties, banking verification services and information from consumer reporting agencies. We may further collect information about you from third-party data sources, such as brokers, banks and government databases. We may combine data we collect about you from third-party data sources with data we collect from you and may use and share such data as described in this Privacy Policy. All information we collect and/or receive from such third-party sources is collectively referred to as “Third-Party Information.”

10. Information Collected by or Through Third-Party Advertising

We may share Other Information about you with third parties that Nestvst has selected and approved for ad distribution and ad optimization (defined as the tailoring, targeting (i.e., behavioral, contextual, and retargeting), analyzing, managing, reporting, and optimizing of ads). These third parties may use cookies, pixel tags (also called web beacons or clear gifs), and other technologies to collect Other Information for such purposes. Pixel tags enable us and these third-party advertising companies to recognize a browser’s cookie when a browser visits the site on which the pixel tag is located in order to learn which advertisement brings a user to a given site. In addition, we may receive Other Information from advertisers and/or their service providers such as advertising identifiers, IP addresses, and postconversion data. These web advertising and data companies will follow your online activities over an extended time and will aggregate the information about you and available to it. You may choose to optout of this type of tracking and sharing of information at any time by selecting the specific partners you wish to exclude and visiting these websites: <http://www.aboutads.info/choices> and <http://optout.networkadvertising.org/>.

How the Information is Used and Shared

You authorize us to use the Personal Information, the Third-Party Information, and the Other Information (collectively, the “Information”) to provide and improve our Platform and Services; to help us improve the content and functionality of our Platform and Services; to provide trade recommendations; to advise you about your portfolio; to solicit your feedback; and to inform you about our products and services and those of third parties.

You also authorize us to use and/or share Information as described below.

- We will access, use, and share the Information as required to fulfill our contractual obligations to you or subsequent requests for support by you;

- We use Information we have about you to provide you suggestions of financial services and offers that we believe may be beneficial to you;
- We will use your Information for our internal business purposes, including but not limited to, creating user state modeling and comprehensive behavioral profiling;
- Nestvst, like many businesses, sometimes hires other companies to perform certain business-related functions on our behalf. When we employ another company to perform a function of this nature, we only provide it with the information that it needs to perform its specific function. These companies are authorized to use your Information only as necessary to provide these services to us. Examples of such functions include website hosting, mailing information, maintaining databases, ID verification, processing applications, processing payments and completing transactions;
- We may share some or all of your Information with our affiliates;
- As we develop our businesses, we might sell or buy businesses or assets. In the event of a corporate sale, merger, reorganization, sale of assets, launch of a new subsidiary, dissolution, or similar event, the Information may be part of the transferred assets and in that case you will be notified via email and/or a prominent notice on our Platform of any change in ownership; and the Privacy Policy in effect before the change in ownership, as well as any choices you may have made regarding uses of your Personal Information, shall remain in effect afterward until modified;
- In an ongoing effort to better understand our Clients, the Platform, the Services, and the products and services of Nestvst, we may analyze certain Information to compile information about our Client demographics, interests and behaviors and to create data analytics on an aggregate basis. This aggregate information does not identify you personally. We may share this aggregate information with our or affiliates' agents or trusted business partners, and other trusted third parties. We may also disclose aggregated user statistics in order to describe the Platform, the Services and our products and services to current and prospective business partners and investors and to other third parties for other lawful purposes;
- Nestvst may disclose your Information if required to do so by law or in the good faith belief that such action is necessary to (i) comply with a legal obligation, (ii) protect and defend the rights or property of Nestvst, (iii) act in urgent circumstances to protect the financial security of users of the Platform or the public against fraud or other harm, or (iv) protect against legal liability;
- Nestvst may from time to time enter into agreements with third parties, such as employers or affiliate membership groups, pursuant to which the third-party may pay a portion or all of fees of its employees or members, and may on occasion make direct or indirect contributions to the Nestvst account of its employees or members. This is generally implemented by distributed "promotional codes" that are sponsored by the employer or affiliate membership group. If you use the benefit provided by an employer or affiliate group, you consent to additional anonymized reporting with respect to the participation, contribution rates, engagement, etc., of the employees or members, and consent to personalized reporting (i.e., where you may be specifically identified) solely and exclusively to (x) confirm your use of Nestvst to your employer or affiliate membership group, and (y) if the employer or affiliate membership group makes a contribution to your Nestvst account, to confirm receipt of the specific amounts contributed. In addition, if the benefit the employer or affiliate group provides includes embedding the Nestvst experience in a broader experience hosted by the employer or affiliate, by using such benefit you consent to Nestvst embedding the Nestvst experience in the hosted experience, and understand that your Personal Information may be shared in order to implement the hosted experience; and
- We may share your Information with third parties, including but not limited to third-party market research firms for analysis purposes. These firms may collect personally identifiable information about your online activities over time and across different websites when you use the Website or Platform. The

market research data such third parties generate helps us to better segment our Client base and understand what products and services could be appropriate for our Clients.

Sharing of Your Information with Non-affiliated Third Parties

We will not share your Information with non-affiliated third parties that may use your Information to market to you, without obtaining your opt-in consent. We will request your opt-in consent to such sharing of your Information when we present you with the information about such opportunity. Only with your consent will we disclose Information to non-affiliated third parties to use to market to you.

Right to "opt out" of Sharing Your information with Non-affiliated Third Parties

If you have opted-in for this kind of sharing of your Information, then you may: (i) choose to opt-out of such sharing by contacting us at info@nestvst.com; or (ii) request information regarding our disclosure of your Information to such non-affiliated third parties by contacting us at info@nestvst.com.

Accessing and Modifying Information Communication Preferences

If you have provided us any Communication Preferences, you may access, remove, review, and/or make changes in your registered account settings page. If you experience difficulties, please contact customer support at info@nestvst.com. We will respond to your request as soon as possible. Please note that customer service is not able to make changes on your account.

Communication Preferences

When you sign up for information about our Services or newsletter(s), we will send periodic emails to you regarding the Services or to tell you about services we believe will be of interest to you.

If at any time you wish not to receive any future newsletters or marketing communications or you wish to have your name deleted from our emailing lists, please follow the unsubscribe instructions included in these emails or contact us at info@nestvst.com. We will use commercially reasonable efforts to process such requests in a timely manner.

Note however that we and/or our broker(s) and/or custodian(s) will send you as a user of the Services administrative and transactional communications that are reasonably necessary to provide the Services, such as billing, brokerage or service notifications and you cannot opt out of receiving such communications.

By providing your phone number you consent to Nestvst calling or texting you using an automated telephone dialing system and/or prerecorded messages, even if you incur charges for receiving such communications. For example, we may send you informational text messages to your mobile device. You can revoke your consent to receiving text messages by replying "STOP".

How We Secure Your Information

The security of your information is important to us. When you enter sensitive information (such as bank account information) in our Platform, we encrypt the transmission of that information using secure socket layer technology (SSL). We and our custodian also use third-party ID verification to ensure our users' true identities are validated.

We take commercially reasonable technical, administrative, and physical safeguards to protect information from loss, misuse, and unauthorized access, disclosure, alteration, or destruction. Please understand, however, that no security system is impenetrable. We cannot guarantee the security of our

databases or the databases of the third parties with which we may share such information, nor can we guarantee that the information you supply will not be intercepted while being transmitted over the Internet. In particular, email sent to us may not be secure, and you should therefore take special care in deciding what information you send to us via email. If you have any questions about security on our website, you can contact us at info@nestvst.com.

Retention of Your Information

We will retain your Information for as long as it serves the purpose(s) for which it was initially collected as stated in this Privacy Policy, or subsequently authorized. We will also retain and use your Information as necessary to comply with our legal obligations, resolve disputes, and enforce our agreements.

Exclusions

This Privacy Policy does not apply to any Personal Information collected by Nestvst other than Personal Information collected through the Platform and/or Services. This Privacy Policy shall not apply to any information you publish or provide to Nestvst publicly, any ideas for new products or modifications to existing products, or other unsolicited submissions (collectively, "Unsolicited Information"). This includes, but is not limited to, information posted to any public areas of the Platform (collectively, "Public Areas"). All Unsolicited Information shall be deemed to be non-confidential and Nestvst shall be free to reproduce, use, disclose, distribute and exploit such unsolicited information without limitation or attribution.

Suspicious Emails

We never request nonpublic information or account information (such as username and password) by email. If you receive an unsolicited email or other electronic communication that appears to be from Nestvst but it asks for your user credentials or you suspect for any other reason may be from some malicious source, please email us at info@nestvst.com.

About Children

SUBSCRIBERS TO OUR SERVICES MUST BE AGE 18 O R O V E R .

We do not knowingly collect Personal Information from children under the age of 13 through the Platform. If you are under 13, please do not give us any Personal Information. We encourage parents and legal guardians to monitor their children's Internet usage and to help us enforce this policy. If you have reason to believe that a child under the age of 13 has provided Personal Information to us, please contact us, and we will endeavor to delete that information from our databases.

Links to Other Websites and Integration of Third-Party Content

This Privacy Policy applies only to the Platform. The Platform may contain links to other websites or services not operated or controlled by Nestvst (the "Third-Party Sites"). The policies and procedures we describe here do not apply to the Third-Party Sites. The links from the Platform do not imply that Nestvst endorses or has reviewed the Third-Party Sites. We suggest contacting those sites directly for information on their privacy policies.

In addition, we may integrate third-party content from other websites, such as YouTube videos, into the Platform. Our use of YouTube's API services subjects you to Google's Privacy Policy available at <http://www.google.com/policies/privacy> when you access YouTube content through our Services and you agree to certain of your information being collected by YouTube in accordance with its privacy policy.

Former Clients

If your Client relationship with Nestvst ends, we will not destroy your Information unless required or permitted by law. See “Retention of Your Information” above. We will continue to treat your Personal Information retained in accordance with this Privacy Policy and applicable laws.

Other Important Notices

The Platform and the Services are intended for natural persons who are citizens or other lawful residents of the United States and who are located in the United States. The Platform, the Services and their servers are controlled and operated in the United States. If you are located outside the United States and use the Platform and/or the Services, you do so at your own risk. Please be aware that your Information may be transferred to, processed, maintained, and used on computers, servers, and systems located outside of the jurisdiction of the United States and the privacy laws may not be as protective of you.

Changes to Nestvst’s Privacy Policy

We may update this Privacy Policy to reflect changes to our information practices. If we make any material changes to this Privacy Policy, we will notify you by email (sent to the email address specified in your account) or by means of a notice on the Platform prior to the change becoming effective. By visiting and/or using the Platform after we make any such changes to this Privacy Policy, you are deemed to have accepted such changes. Please be aware that, to the extent permitted by applicable law, our use of the Information is governed by the Privacy Policy in effect at the time we collect such information. We encourage you to periodically review this page for the latest information on our privacy practices.

Contacting Nestvst

Please feel free to contact us if you have any questions about Nestvst’s Privacy Policy or our information practices at info@nestvst.com.