

Security & Privacy Statement

Be confident—your information is secure with GuidedChoice! We protect you, our customer, against accidental or malicious corruption, and we encrypt data for privacy purposes, ensuring that your personal information is used only to provide advice. It will not be redistributed to any other third party.

Your Security

Our Server Is Designed with Security in Mind

Access to the GuidedChoice site is protected by Secure Sockets Layer (SSL) protocol. This software has set the industry standard for secure data transfer and will safeguard the channel between server systems by encrypting your personal information as it travels across the Internet. SSL is used by most web sites, provides server authentication, 128-bit data encryption, and assurance of message integrity.

Additional security is provided through the use of your unique password. We track who is logged onto the system, and provide the end user with only three attempts to log on with accurate data. Should the user be unable to match the data in our system after three attempts, they are locked out of the system for that session.

Do Your Part—Additional Security Measures

In addition to the security measures we take, you should take some of your own precautionary measures as well. We suggest the following:

1. Protect your password. Never tell anyone and try not to write it down. If you must write it down, keep it well hidden.
2. Create a hard-to-guess password. A combination of numbers with upper and lower case letters is best.
3. Change your password frequently for added security.
4. Log off the GuidedChoice system before leaving your computer.
5. Close your browser after obtaining advice from GuidedChoice.

Your Privacy

We Vow To Keep It Private

When using one of our GuidedChoice advice solutions, you'll be asked for personal information about your finances. We promise not to sell, reveal or share any of your personal information with any third parties, including your own employer. Your privacy is of the utmost importance. Below is a list of additional information about your privacy:

- How Your E-Mail Address Will Be Used
- About The Personal Information We Collect
- How Your Personal Information Is Used
- How To Change Your Personal Information
- Privacy Through GuidedChoice Customer Service
- How To Contact Us With Additional Questions

If you have questions or concerns regarding your privacy, please contact GuidedChoice Customer Service at 800-242-6182 or help@guidedchoice.com.

How Your Email Address Will Be Used

At GuidedChoice, we may use your e-mail address to keep you updated on a variety of issues, from legal and regulatory messages to updates on the products and services we offer, or ask for your participation in a survey. For some, our system is also designed to send an e-mail trigger when you experience a life event that may affect your financial goals. These life events can be as minor as a salary increase or as significant as coming of retirement age. GuidedChoice does this to help you analyze and redefine your goals based on your changed circumstances.

About the Personal Information We Collect

GuidedChoice collects personal information when you seek advice through our solutions. Your employer provides GuidedChoice with data feeds that include general information like name, address, birth date, gender, annual income, mailing address, current savings rate, and current value and positions of your retirement plan. You'll need to tell us about your marital status, dependent children, and additional financial accounts. If you indicate you have a spouse and you wish to plan with his/her personal and financial account information taken into consideration, you'll need to provide that as well.



Occasionally, we may also conduct optional surveys through our web site and customer service department. In this case, we will collect the information you provide from your answers to the survey.

We also collect data in our log files for purposes of reporting. We log the length of time of your visit and the number of times you visit. We use these aggregated results to analyze the effectiveness of our web site. Employers who contract our services may receive reports with this information on an aggregated basis—not your specific information.

How Your Personal Information Is Used

Upon acceptance of our advice, GuidedChoice will send a data feed to your employer and/or plan recordkeeper/administrator to begin automatic deposits from your paycheck. We will keep a log of the advice we provide in our Fiduciary log files for your protection. We are required by law to keep these records. This enables us to provide you with a history of the advice we have given.

The investment advice you receive is maintained by GuidedChoice to provide you with the services you have requested and to fulfill our legal and regulatory requirements. The primary goal of GuidedChoice is to offer you a private, customized experience. This includes portfolio recommendations and projections based on your current holdings. By having your personal information, we are better able to help you reach your retirement goals and give you more accurate advice.

Some of the demographic information collected from your employer, such as age, gender and account value, may be used internally in aggregated form for market research purposes. It will not be linked to any of your personal information.

How To Change Your Personal Information

Most of your personal information is automatically uploaded into the GuidedChoice system through data feeds from your employer and/or plan recordkeeper/administrator. Some of it, like your name, address, and date of birth cannot be changed within our system; you must contact your employer and/or plan recordkeeper/administrator to incorporate the changes. Any additional information you provide about your spouse, dependents, and personal financial accounts can be changed any time you log on to the service.



Privacy Through GuidedChoice Customer Service

Your privacy is also assured any time you contact GuidedChoice Customer Service for information. All Customer Service agents go through background checks prior to being hired and have to sign binding confidentiality agreements. Calls are monitored to provide for your security and accuracy of the information.

To contact GuidedChoice Customer Service, send an email to help@guidedchoice.com or call the toll-free number 800-242-6182 between the hours of 8:00 a.m. to 5:00 p.m. PT, Monday through Friday. All emails should be answered within 48 business hours.

How To Contact Us With Additional Questions

Please feel free to contact us if you have further questions about our privacy and security policies. You can reach us in the following ways:

- Email: help@guidedchoice.com
- Toll-free: [800-242-6182](tel:800-242-6182)
Monday-Friday, 8:00 a.m. to 5:00 p.m. PT
- Mail: [GuidedChoice Customer Service](#)
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