

**CALIFORNIA AND VERMONT RESIDENTS
CONSENT TO DISCLOSURE OF INFORMATION**

Zack’s Insight, provided by Zack’s Intelligence LLC make your privacy a top priority. We value the trust you give us to protect the security and confidentiality of your personal financial information.

Your Rights

State law prohibits financial institutions from disclosing your customer information to nonaffiliated third parties unless you consent or the disclosure is otherwise permitted by law.

Your Choices

Please check the box below to consent to our sharing of your personal information for the following reason. If you do nothing, we will not share your personal information except as permitted by law.

Duration of Consent

Your consent will remain in effect until you revoke or modify it. You may revoke or modify your consent at any time.

By completing this form and signing below, you consent to the sharing of your nonpublic personal information by Zack’s Insight with nonaffiliated third parties including for them to market their products or services to you. For more information about the categories of personal information and the categories of recipients, please see information provided at the end of this notice. Please complete and sign this form and return it to us using one of the methods described below. To modify or revoke your consent, contact us at (312)-265-9157 or notify us in writing using the addresses below.

Name (please print)

Email

Signature

Date

To exercise your choice, do one of the following:

1. Complete this form and mail it to us at 101 N Wacker Dr Suite 1500, Chicago, IL 60606.
2. Send an email with the subject line “State Consent” to support@zacksintelligence.com (For security reasons, please do not send us your account number via email.)

We will retain this form as completed by you and provide a copy of the completed form upon your request. You may wish to make a copy of the document for your records.

Disclosure of Personal Information

The types of personal information we disclose depend on the product or service you have with us. If you use Zack’s Insight, this information can include:

- Investment experience and risk tolerance
- Transaction or loss history
- Assets and account balances

Nonaffiliates we share with can include financial service companies and nonfinancial service companies.