

This privacy policy applies to data collected through ZacksInsight.com and ZacksIM.com, provided by the Registered Investment Advisors Zacks Intelligence LLC and Zacks Investment Management, Inc., respectively. The privacy policy that applies to most users who seek to or obtain investment advice, can be seen [here](#). Some states have comprehensive data privacy laws which apply only to the data that is not related to our relationship with you as a financial institution. Users who are covered by those state laws have additional rights related to that data. This privacy policy covers that data and the associated rights. The policy does not provide rights to users who are not covered by these state laws.

Privacy Policy

Customer data privacy and security are a top priority. This Privacy Policy outlines the types of information we gather from your use of this service, including our website and offline interactions, (together, the “Service“), how we use it, with whom we might share it, how we keep it secure, and the choices you have about the information you choose to share with us.

Information We Collect

The types and categories of personal information (“Personal Information”) we collect depends on how you engage with us. This information may include, but is not limited to the following:

- Identifiers, such as name, email address, postal address, and phone number.
- Your content, such as testimonials or your survey responses outside of your use of financial services.
- Information about your use of the site, such as what is gathered by weblogs and cookies.
- Information about your device or web access such as device identification and IP address.
- Audio and visual information, such as pictures and/or videos the user may upload with their testimonial.

How We Collect Personal Information:

We collect Personal Information by voluntary submissions from you through our website or if you contact us directly, such as via phone, email, or mail. We also collect Personal Information automatically through cookies and other technologies, as described more fully below. If you work for one of our service providers, vendors, or partners, we may also receive Personal Information about you, such as your role and contact information, from your employer in the course of our business relationship.

How we Use Your Personal Information:

Operational

We use your Personal Information to provide you with the Service, including operating site analytics, marketing, and research related activities, as well as to supply other administrative services such as debugging the Services, remembering your preferences, etc.

Email Services

If you subscribe to one of our subscription services, we may also use technology to track how you engage with our emails.

You can unsubscribe from these emails at any time by using the unsubscribe link in the email or through your account settings.

Business Contacts

If you apply for a job with us, you may submit certain Personal Information that is required for the application and which we may be legally required to request or obtain from you. This can include work history, contact information, demographic information, or educational history. Similarly, if you work with a business that partners with us or serves us, we may require your name and contact information along with information about your role. In each context, the purpose of collecting your information is to further our professional relationship and business objectives.

Feedback and Surveys

If you submit feedback directly to us, we will collect your name and contact information to respond to you. If you submit feedback via a third party operated survey, we will collect the information you provide. We value your input and may use third parties to improve our effectiveness in collecting it.

Cookies and Third-Party Tracking

We use cookies, tags, pixels, and similar technologies to enhance your experience on the internet. These technologies allow us to recognize your preference information, keep track of the choices you make, and facilitate effective website administration. These technologies also allow us to participate in behavior-based advertising by tracking the actions of users online over time and across different web sites. A third party uses these technologies (e.g., cookies) to collect information about your use of the Service so that it can provide advertising about products and services tailored to your interests on our website or on other websites. You may choose to opt out of third-party tracking by clicking the icon for the cookie preference center on our website, as

shown here: 

Additional Uses

In addition to the purposes and uses described elsewhere in this policy, we use information in the following ways:

- To identify you when you visit our websites.
- To improve our services and product offerings.
- To conduct analytics.
- To communicate with you, such as to respond to and/or follow-up on certain requests, inquiries, issues, or feedback.
- To send marketing and promotional materials including information relating to our products, services, sales, or promotions, or those of our business partners.
- To detect and protect against malicious, deceptive, fraudulent, or illegal activity, including violation of our policies and terms and conditions, security incidents, and harm to the rights, property, or safety of our company and our users, employees, or others.
- To debug, identify and repair errors that impair existing intended functionality of our website.

- To comply with our legal or regulatory obligations, to establish or exercise our rights, and to defend against a legal claim.
- For internal administrative purposes, as well as to manage our relationships.
- For such other purposes as you may consent (from time to time).

Your Personal Information is not used in automated decision making that produces legally significant effects. To the extent that we maintain deidentified Personal Information, we do not attempt to reidentify it.

How We Share Information

In addition to the specific situation discussed elsewhere in this Privacy Policy, we may disclose Personal Information in the following situations:

- **Affiliates and Acquisitions.** We may share information with our corporate affiliates (e.g., parent company, sister companies, subsidiaries, joint ventures, or other companies under common control) where the law permits such sharing. If another company acquires, or plans to acquire, our company, business, or our assets, we will also share information with that company, including at the negotiation stage.
- **Other Disclosures Without Your Consent.** We may disclose information in response to subpoenas, warrants, or court orders, or in connection with any legal process, or to comply with relevant laws. We may also share your information to establish or exercise our rights, to defend against a legal claim, to investigate, prevent, or take action regarding possible illegal activities, suspected fraud, safety of person or property, or a violation of our policies, or to comply with your request for the shipment of products to or the provision of services by a third-party intermediary.
- **Public.** The Service may provide the opportunity to post comments, or testimonials, in a public forum. If you decide to submit information on these pages, that information may be publicly available. Should you seek to have your testimonial that you provided removed from our site, please contact us using the information below to make such a request.
- **Partner Promotion.** We may offer promotions with third party partners. If you decide to participate in a promotion that is sponsored by a third party partner the information that you provide will be shared with us and with them. Their use of your information is not governed by this privacy policy.
- **Service Providers.** We may share your information with service providers. Among other things service providers may help us to administer our website, conduct surveys, provide technical support, and process payments.
- **Other Disclosures with Your Consent.** We may disclose your information to other third parties when we have your consent or direction to do so.

We do not “sell” your Personal Information.

| | Category of Recipients |
|--|------------------------|
|--|------------------------|

| Category of Personal Information | Disclosures for a Business Purpose | Sharing for Targeted Advertising |
|--|---|---|
| <p>Identifiers – this may include things like name, alias, postal address, unique personal identifier, online identifier, email address, or account name.</p> | <ul style="list-style-type: none"> • Affiliates or subsidiaries. • Data analytics providers. • Internet service providers. • Joint marketing partners. • Operating systems and platforms. • Other Service Providers. • Payment processors and financial institutions. • Professional services organizations, this may include auditors and law firms. • Social networks. | <ul style="list-style-type: none"> • Advertising networks. |
| <p>Commercial information – this may include information about products or services purchased, obtained, or considered, or other purchasing or consuming histories or tendencies.</p> | <ul style="list-style-type: none"> • Affiliates or subsidiaries. • Data analytics providers. • Internet service providers. • Joint marketing partners. • Other Service Providers. • Payment processors and financial institutions. • Professional services organizations, this may include auditors and law firms. • Social networks. | <ul style="list-style-type: none"> • Advertising networks. |
| <p>Internet or other electronic network activity information – this may include browsing history, search history, and information regarding an individual’s interaction with an internet website, app, or ad.</p> | <ul style="list-style-type: none"> • Affiliates or subsidiaries. • Data analytics providers. • Internet service providers. • Joint marketing partners. • Other Service Providers. • Professional services organizations, this may include auditors and law firms. • Social networks. | <ul style="list-style-type: none"> • Advertising networks. |
| <p>Audio, electronic, visual, thermal, olfactory, or similar information</p> | <ul style="list-style-type: none"> • Affiliates or subsidiaries. • Data analytics providers. • Joint marketing partners. • Operating systems and platforms. • Other Service Providers. • Payment processors and financial institutions. • Professional services organizations, this may include auditors and law firms. • Social networks. | <ul style="list-style-type: none"> • N/A |

| | | |
|---|--|---|
| <p>Professional or employment-related information – this includes, for example, information submitted by job applicants.</p> | <ul style="list-style-type: none"> • Affiliates or subsidiaries. • Other Service Providers. • Payment processors and financial institutions. • Professional services organizations, this may include auditors and law firms. | <ul style="list-style-type: none"> • N/A |
| <p>Inferences drawn from any of the information listed above</p> | <ul style="list-style-type: none"> • Affiliates or subsidiaries. • Data analytics providers. • Joint marketing partners. • Other Service Providers. • Professional services organizations, this may include auditors and law firms. | <ul style="list-style-type: none"> • N/A |

How We Protect and Retain Information

Data Security

We are committed to protecting your Personal Information. Our efforts to protect your Personal Information include physical, administrative, and technical measures. All information that you provide to us is stored on our secure servers. While we do our best to protect your Personal Information, we cannot ensure or warrant the security of any information you transmit to us, and you do so at your own risk. Where applicable, you are responsible for maintaining the secrecy of your passwords and/or any account information.

The transmission of information via the internet is not 100% secure. Although we will do our best to protect your Personal Information, we cannot guarantee the security of your data transmitted to our site; any transmission is at your own risk. If we are required by law to inform you of a breach to your Personal Information, we may notify you electronically, in writing, or by telephone, if permitted to do so by law.

Our site may contain links to external sites. We are not responsible for the privacy policies or the content of such sites.

Retention Period

We will retain your Personal Information for as long as needed or permitted in light of the purpose(s) for which it was obtained and consistent with applicable law. The criteria used to determine our retention periods include: (i) the length of time we have an ongoing relationship with you and provide the Service to you; (ii) whether there is a legal obligation to which we are subject; or (iii) whether retention is legally advisable (for example, in regard to applicable statutes of limitations, litigation, or regulatory investigations).

Your Consumer Rights Under U.S. State-Specific Privacy Laws

Individuals covered by U.S. state-specific privacy laws have additional rights related to their Personal Information. You may designate an authorized agent to exercise these rights on your behalf. We will not discriminate against you if you choose to exercise your rights under the applicable state laws.

- **Right to Know:** You may request access to the specific pieces of Personal Information we have collected about you or to confirm such processing. In certain limited circumstances, you may also request to receive access to your data in a portable, machine-readable format. To the extent that the information is not available in this policy, you may contact us to request it, and, where the law requires, we will provide the information.
- **Deletion:** You may request that we delete the Personal Information we have collected about you (with some exceptions). We may retain certain information as required or permitted by applicable law. If you delete your Personal Information, some of our products and services may no longer be available.
- **Correction:** You may request that we correct inaccurate Personal Information, though in many instances, you may be able to independently correct your information by logging into your account.
- **List of Third-Party Recipients:** In some jurisdictions, you are entitled to request a list of third parties to which we have disclosed Personal Information. To see a list of third parties that receive your Personal Information, go to the marketing tab, available through the “see details” link in the consent banner. Certain jurisdictions create the right for you to obtain a list of categories of third parties with which we share information. That can be seen in the table above.
- **Limitation of Use:** You may request that we limit the use and disclosure of sensitive Personal Information.
- **Online Tracking.** We do not recognize the “do not track” signal.
- **Opt out of Targeted Advertising.** You may opt out of online tracking based targeted advertising (e.g., cookies) by clicking the icon for the cookie preference center on our

website, as shown here:



If you change browsers or computers, or if you clear your browser’s cache, you may need to click the link again to apply your preference.

Submitting Requests

If you are covered by a law that grants you the rights described above, you may exercise those rights by contacting us via the “Contact Us” section below. If you disagree with our denial of a request and your jurisdiction permits you to appeal such denial, you may appeal our decision by contacting us with the subject line “Appeal.”

As required by law, we will require you to prove your identity for some requests. We may verify your identity by phone call or email. Depending on your request, we will ask for information such as your name, information about your account use, or the date of your last purchase from us. We may also ask you to provide a signed declaration confirming your identity. Following a

request, we will use reasonable efforts to supply, correct or delete Personal Information about you in our files.

Additional Information for California Residents

- **California Shine the Light.** If you would like more information concerning the categories of Personal Information (if any) we share with third parties or affiliates for those parties to use for direct marketing, please submit a written request to us using the information in the Contact Us section below.
- **California Sensitive Information Disclosure.** We collect the following categories of sensitive Personal Information (as defined under California law): information revealing race or ethnicity or sexuality (only to the extent that such information is collected in the job application process). This information is collected to comply with laws and manage our business. We do not use such information for any purposes that are not identified within the California Privacy Rights Act Section 1798.121.

Changes to the Privacy Policy

We reserve the right to amend this Privacy Policy at any time, for any reason, and may do so by posting a new version online. It is our policy to post a notification about any changes we make to our Privacy Policy on the Website Home Page. If we make material changes to how we treat our users' Personal Information, we will make such changes notable on our Website Home Page. Your continued use of the Website and/or continued provision of information to us will be subject to the terms the posted Privacy Policy.

Contact Us

If you have any questions, comments, or complaints concerning our privacy practices, or if you need to access this Privacy Policy in an alternative format due to having a disability, please contact us at the appropriate address below. We will attempt to respond to your requests and to provide you with additional privacy-related information.

Email: support@zacksintelligence.com

Phone: (312)-265-9157

Mail: 101 N Wacker Dr Suite 1500, Chicago, IL 60606

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Effective date:

Last updated 11/18/2025.