



THE
MEDICI
PROJECT
C.G. Medici & Co.

PRIVACY POLICY

UPDATED: JANUARY 2022

The Privacy Policy (“Policy”) outlines the types of user data we collect, store, share and manage. We also summarize our information security practices to ensure user data is protected to the best of our ability.

We are required by law to provide this Policy to you, but honestly we would do it anyway because it is important you understand how ALL service providers are using your personal information.

Here’s the legal bit: As a registered investment advisor, Medici adheres to rules and regulations put in place by the Securities and Exchange Commission (“SEC”) and other regulatory authorities regarding privacy of consumer financial information. We maintain all personal information, financial and otherwise, with strict confidentiality. Unless specifically required by law, we do not disclose any nonpublic personal information about current or former clients to anyone.

TL/DR: We handle your personal information the way we would want ours to be treated. The Golden Rule applies to data, as well as people!

Information We Collect/Store

Like all of us, we need access to certain information In order to do our job properly. “Garbage in, garbage out,” so to speak. Some of the information we need just so happens to be considered Personal Identifiable Information, or “PII.” This means we need to keep it way more safe than, say, your favorite color.

To advise you and help you meet your financial goals, you will most likely need to provide us the following personal information:

- Demographic information: Such as name, address, age, household information, etc.
- Contact information: Such as email address, phone number, etc.
- Financial information: Such as account balances, transactions, personal goals, read-only access to your financial accounts, etc.
- Communications: Correspondence within the Medici mobile Application (“App”), email, or other secure channels.

We maintain stringent electronic safeguards to protect PII. We do NOT keep any physical copies because it is an enormous waste of paper and we love trees. It is also a security risk. We do have a sophisticated data backup and retention process so that even if something goes bump in the night, your data is not lost and we can continue to do our job.

How We Use Your Information

The information you give us allows us to understand you and your goals. We ultimately use this information to help advise you to meet your goals and improve our algorithms. Part of this may involve suggesting new financial products to you, serviced by our network of partner organizations. We don’t just partner with anyone though. All of our third party service providers undergo a thorough due diligence and background process. We aren’t going to suggest that you engage with anyone that we wouldn’t ourselves.

How We Protect Your Information

This is the part where we disclose all of our hidden data security secrets so that hackers can more easily access your data. Yeah, right! You wouldn’t have your debit pin number printed on the outside of your wallet, would you? If you really want to know how we do it and you’re a qualified applicant, join the team at www.medici.ai/careers

How & Why We Share Your Information

As consumers ourselves, we appreciate knowing how our personal information is used. That is why we take the role as gatekeeper to all of your information very seriously. Most companies will share limited data with affiliates to see if you fit into a target market usually based on some kind of demographic category. If you do, you will be inundated with advertisements, emails, and even phone calls from companies you have never heard of before!

We do it differently. We get to know you, your goals, objectives, and what you do and don't want. Then we screen what our partner providers offer and see if there is a match. If there is, we tell you (not them) and you give us the green light to get more information or start the process. Only if you agree to move forward will we share your personal information.

For example, if we know you loooooove animals and we found a zoo that was offering a credit card with sweet perks, we would see that as a match and ask you if you were interested in learning more. Unlike other companies, we would NOT give your information to the zoo and start spamming you with ads of penguins and otters just because you fit in a box they are trying to reach.

Separately, we rely on a number of well-known and vetted technology providers to operate our services. This includes things like the database that stores your information. As we mentioned before, we guard this through strict security protocols and continually evaluate our practices to keep everything groovy.

Cookies

We don't have cookies right now. Our favorites are chocolate chip though, or any combo of chocolate and peanut butter. As far as the techy kinds you see on every website you go to these days, we don't use those either. We may in the future though, in which case you will see specific updates in this section.

Well, that about covers the basics. If you have any questions or want to learn more, please feel free to reach out to us at info@medici.ai

Cheers!

Material Changes

January 2022	First draft completed.