

## California Consumer Privacy Act (CCPA) Notice

### Notice to California Residents

Last Updated: May 2025

This **Notice of Collection for California Residents** (“Notice”) is provided by **Balefire Wealth, LLC** (“Balefire,” “we,” “us,” or “our”) in accordance with the **California Consumer Privacy Act of 2018 (CCPA)**, as amended. It applies to the **Personal Information** of California residents (“consumers,” “you,” or “your”) that we collect in connection with the financial and advisory services we provide.

If you reside outside the State of California, this Notice does not apply to you. Please refer to our general **Privacy Policy** for more information.

In the event of a conflict between this CCPA Notice and our general Privacy Policy, this Notice shall govern with respect to California residents only.

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### Information We Collect

Balefire may collect or has collected the following **categories of Personal Information** about consumers, their households, or their devices **within the past 12 months**:

#### Identifiers

Examples: real name, alias, postal address, email address, phone number, online identifier, Internet Protocol (IP) address, Social Security number, driver’s license number, passport number, or other similar identifiers.

#### Customer Records (as defined in Cal. Civ. Code § 1798.80(e))

Examples: name, signature, address, telephone number, employment and employment history, financial information (e.g., bank account or investment details), or insurance policy number. Some personal information in this category may overlap with other categories.

#### Protected Classification Characteristics (under California or federal law)

Examples: age (40 years or older), citizenship, marital status, sex (including gender), veteran or military status.

#### Commercial Information

Examples: records of products or services purchased, considered, or inquired about in relation to our financial advisory services.

#### Internet or Other Network Activity

Examples: browsing history, search history, interactions with our website, portal, applications, or marketing communications.

### **Audio, Electronic, or Visual Information**

Examples: voicemails, recorded calls, and video recordings (if applicable, such as during virtual meetings or advisory sessions).

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### **What Is Not Considered Personal Information under the CCPA**

Personal Information does **not** include:

- Publicly available information from government records
- Deidentified or aggregated consumer information
- Information otherwise exempt from CCPA, including data subject to:
  - **Gramm-Leach-Bliley Act (GLBA)**
  - **California Financial Information Privacy Act**
  - **Health Insurance Portability and Accountability Act (HIPAA)**
  - **California Confidentiality of Medical Information Act**

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If you have questions about how we use, share, or retain your information under CCPA, or wish to exercise your rights under this law, please contact our compliance team at [compliance@balefirewealth.com](mailto:compliance@balefirewealth.com) or visit our Privacy Policy page.