

Privacy Policy for the URL <https://advisorgiant.com/>

## PRIVACY POLICY — AdvisorGiant.com

Operated by Giant Partners, Inc., a California Corporation

Doing Business As (“DBA”) Advisor Giant

Last Updated: [Insert Today's Date]

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Welcome to AdvisorGiant.com (“Site”). This Privacy Policy explains how **Giant Partners, Inc., doing business as Advisor Giant** (“we,” “us,” “our”) collects, uses, shares, and protects information submitted on this Site for the purpose of connecting consumers with financial advisors, retirement services, or related offerings.

By using this Site, you agree to the practices described in this Privacy Policy.

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### 1. Information We Collect

We collect information in two ways:

- (1) **Information you submit directly**
  - (2) **Information collected automatically when you visit the Site**
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#### 1.1 Information You Provide

When you submit a request on AdvisorGiant.com, we may collect:

- Name
- Phone number
- Email address
- Age range
- Types of retirement or investment accounts
- Estimated household income (ranges only)
- State of residence
- Financial preferences or goals (if provided)
- Any additional information you voluntarily submit

We do **not** request Social Security Numbers, account numbers, banking information, or sensitive personal details.

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## 1.2 Information Automatically Collected

When you visit the Site, we automatically collect:

- IP address
- Device type, browser type, OS
- Pages visited
- Time on site
- Navigation paths, clicks, scroll behavior
- General location (approximate)
- Cookies & tracking identifiers
- Session metadata

We use industry-standard technologies to collect this information, including:

### Microsoft Clarity

Used to understand anonymous behavioral patterns such as clicks, scroll depth, and engagement.

Clarity **does not** capture form input fields or personal information.

### TrustedForm (ActiveProspect)

Used to certify your form submission for legal and compliance verification.

TrustedForm may collect metadata and session-level info but **does not** capture your personal data.

A certificate may be shared with the financial advisor who receives your lead.

### HubSpot CRM

Used solely to store lead submissions.

HubSpot tracking cookies are **not enabled** on this Site.

### Meta (Facebook) Pixel & Hashed Data Uploads

We use the Meta Pixel for advertising measurement and optimization.

We may upload **hashed** email and phone numbers to create custom or lookalike audiences.

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## 2. How We Use Your Information

We use information collected from you to:

- Match you with a financial advisor licensed or operating in your state
  - Provide your information to **exactly one advisor partner**
  - Allow that advisor to contact you
  - Improve marketing, advertising, and website performance
  - Verify lead authenticity and prevent fraudulent submissions
  - Respond to your inquiries
  - Comply with legal or regulatory obligations
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## 3. How We Share Your Information

Your information is shared only in the following ways:

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### 3.1 One Assigned Financial Advisor

Your information is shared with **one** financial advisor or advisory company based on:

- Your state
- Their licensing and coverage
- Service availability

The assigned advisor may:

- Contact you
- Store your information in their CRM
- Use your information for their own marketing campaigns
- Retain your information under their own privacy policy

We do **not** control how advisors use or store your information once transferred.

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### **3.2 Service Providers**

We may share information with trusted third-party vendors that assist in operating the Site, including:

- HubSpot (CRM)
- TrustedForm (lead certification)
- Microsoft Clarity (analytics)
- Meta (advertising)
- Hosting and security vendors

These companies may process information solely on our behalf.

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### **3.3 Legal Obligations**

We may disclose information when required by:

- Subpoena
- Court order
- Law enforcement
- Regulatory requirements

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### **3.4 We Do NOT Sell to Unrelated Third Parties**

We do not sell your personal information to unrelated marketing companies.

We only transfer lead data to:

- One selected advisor partner
- Service providers necessary to operate the Site

Under California law, some advertising activity may be considered “sharing,” and you have the right to opt out (see Section 7).

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#### **4. Marketing Communications & TCPA Consent**

By submitting your information on AdvisorGiant.com, you provide written consent for:

**Giant Partners, Inc. (DBA Advisor Giant)**

**AND**

**The financial advisor you are matched with**

to contact you via:

- Manual phone calls
- Manual text messages
- Automated calls (autodialer systems)
- Automated SMS messages
- Prerecorded or artificial voice messages
- Email messages

These communications may include marketing or promotional content.

**Consent is not a condition of purchase.**

Message & data rates may apply.

You may opt out at any time.

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#### **5. Cookies, Pixels & Tracking**

We use cookies and tracking tools for:

- Analytics
- Retargeting
- Advertising optimization
- Site performance
- Fraud prevention

You may disable cookies in your browser settings.

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#### **6. Your Rights (U.S. Users)**

You may:

- Request access
- Request deletion
- Request correction
- Opt out of marketing
- Opt out of sale or sharing of personal information

To exercise your rights, email:

 [privacy@advisorgiant.com](mailto:privacy@advisorgiant.com)

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## 7. California Privacy Rights (CPRA)

California residents have the right to:

- Access their personal information
- Request deletion
- Request correction
- Opt out of “sale” or “sharing”
- Non-discrimination for exercising rights

You may opt out of advertising-related “sharing” at:

 [advisorgiant.com/do-not-sell](https://advisorgiant.com/do-not-sell)

We do **not** collect or process “sensitive personal information” as defined by CPRA.

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## 8. Data Retention

We retain:

- Lead data as long as necessary for business purposes or legal requirements
- Analytics data according to internal policies
- Communications (emails) for recordkeeping

Advisors may retain information independently under their own policies.

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## **9. Data Security**

We use reasonable administrative, technical, and physical safeguards to protect your information.

However, no online system is completely secure.

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## **10. Children's Privacy**

This Site is not intended for anyone under 18.

We do not knowingly collect information from minors.

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## **11. External Websites**

We may link to third-party sites.

We are not responsible for their content or privacy practices.

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## **12. Updates to This Policy**

We may update this Privacy Policy periodically.

Changes will be reflected with a new "Last Updated" date.

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## **13. Contact Us**

For privacy questions or requests, contact:

 [privacy@advisorgiant.com](mailto:privacy@advisorgiant.com)

 Giant Partners, Inc. (DBA Advisor Giant)  
1461 Lawrence Dr #2  
Thousand Oaks, CA 9136