

## FACTS

## What does BeManaged do with your Information?

WHY?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
WHAT?	The types of personal information we may collect includes: <ul style="list-style-type: none"> <li>• Contact Information (address, email, phone) and Social Security Number</li> <li>• Account Login Information and Security Questions</li> <li>• Account balances and Contribution Rates</li> </ul>
HOW?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons BeManaged chooses to share; and whether you can limit this sharing.

Reason some Financial Institutions share your information:	Does BeManaged share your information?	Can you limit sharing?
<b>For everyday business purposes</b> — such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or comply with regulatory requests.	Yes – We use this information to access your account and make the necessary exchanges.	No – We only collect the information essential to manage your funds.
<b>For our marketing purposes</b> — to offer our products and services to you	No – We do not work with outside marketing.	N/A
<b>For joint marketing with other financial companies</b>	No.	N/A
<b>For our affiliates' everyday business purposes</b> — information about your transactions and experiences	No – We have no affiliated entities.	N/A
<b>For our affiliates' everyday business purposes</b> — information about your creditworthiness	No.	N/A
<b>For our affiliates to market to you</b>	No.	N/A
<b>For nonaffiliates to market to you</b>	No.	N/A

Notice	If you are a new customer, we can begin sharing your information 5 days from the date we sent this notice. When you are no longer our customer, we discontinue the sharing of your information as described in this notice; unless required differently by law or regulatory order.
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Who we are:	
Who is providing this notice?	BeManaged is a Fiduciary investment adviser that offers investment management services for participants in defined contribution and discretionary portfolio management services for individuals' retirement accounts. We began our business in February 2006 and are located in Grand Rapids, Michigan.

Questions?	Call (616) 871-0751 or email <a href="mailto:info@bemanaged.com">info@bemanaged.com</a>
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What we do:	
How does <b>BeManaged</b> protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal securities law. These measures include the latest computer safeguards and secured file storage and sharing; as well as employee training targeted at Cybersecurity best practices.
How does <b>BeManaged</b> collect my personal information?	<p>We collect your personal information upon account sign-up to facilitate transactions in your account. The information required to manage your funds depends on the Custodian but generally, we may require:</p> <ul style="list-style-type: none"> <li>• Social Security Number;</li> <li>• Login Information; and</li> <li>• Contact Information (address, email, phone)</li> </ul> <p>Because each account is different, each Client will be required to provide us with different information; but we will never require more information than absolutely necessary for management of the account(s).</p>
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only:</p> <ul style="list-style-type: none"> <li>• sharing for affiliates' everyday business purposes— information about your creditworthiness;</li> <li>• affiliates from using your information to market to you;</li> <li>• sharing for nonaffiliates to market to you.</li> </ul> <p>Because <b>BeManaged</b> participates in none of the above activities, there is no need to limit information sharing.</p>
Texting Opt-In	We will not share your opt-in to an SMS campaign with any third party for purposes unrelated to providing you with the services of that campaign. We may share your Personal Data, including your SMS opt-in or consent status, with third parties that help us provide our messaging services, including but not limited to platform providers, phone companies, and any other vendors who assist us in the delivery of text messages. All the above categories exclude text messaging originator opt-in data and consent; this information will not be shared with any third parties.

Definitions:	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.
Sharing	At <b>BeManaged</b> , the definition of sharing simply means confirmation of your personal information with the Custodian in order to complete a transaction.