

The key points to take from this policy are as follows:

- This Privacy Policy explains how the Total Wealth app ("the app") processes your personal information as part of our comprehensive service offering.
- As an existing client of Mattioli Woods, this policy works alongside our main privacy documentation and your current service agreements to ensure complete transparency about how we handle your information across all our platforms.
- When we say, 'Mattioli Woods Group', 'Mattioli Woods', 'the Group' or 'we', this means Mattioli Woods Limited and all its companies/subsidiaries within the Group who act as a data controller in respect of your personal data/information.

App-Specific Privacy Information

Data Collection Through the App

While you're already familiar with how we handle your information as a Mattioli Woods client, the Total Wealth app introduces some additional aspects of data collection and processing. We want you to understand exactly what information we collect through the app and why we need it.

When you use the Total Wealth app, we collect essential data necessary for the app to function securely and effectively. This includes information about your login and authentication activities, which helps us ensure that only you can access your account. We also gather basic app usage statistics and session data, which helps us maintain security and improve your experience. The app collects certain device information, such as your operating system version and device model, which we need to ensure the app works correctly on your device. If the app experiences any technical issues, we collect crash reports and performance data to help us resolve problems quickly.

You may also choose to provide additional information through the app to enhance your experience. This could include uploading documents, setting investment preferences, defining financial goals, or updating your contact

details. We only collect this information when you actively choose to provide it, and you maintain control over these optional features.

Our Commitment to Privacy in the App

We've designed the Total Wealth app with privacy at its core. The app uses cookies, but only for essential purposes like maintaining your secure session and ensuring the app's basic functionality. We want to be clear that the app does not engage in any tracking of your activity across other apps or websites, and we do not use your data for advertising purposes. Your information is not shared with data brokers, and we do not collect location data unless you specifically authorize it for a particular feature.

Understanding App Permissions

To provide certain convenient features, the app may request access to specific functions of your device. For example, you might want to use your device's camera to scan and upload documents or access your photo library to attach existing images to your account.. It's important to understand that all these permissions are entirely optional, and you can manage them at any time through your device settings.

Enhanced Security Measures

Security is paramount when it comes to financial information, and we've implemented multiple layers of protection in the Total Wealth app. All data transmitted between your device and our servers is protected with end-to-end encryption. Any information stored on your device is encrypted using industry-standard methods. Our systems continuously monitor for any security concerns, and we regularly update the app to address any potential vulnerabilities. For additional protection, the app automatically times out after a period of inactivity.

Integration with Your Existing Services

Seamless Connection to Your Mattioli Woods Account

One of the key benefits of the Total Wealth app is its integration with your existing Mattioli Woods services. The app securely connects to your accounts, allowing you to view your investments through your mobile device. When you update information in the app, it synchronizes with our main systems, ensuring consistency across all platforms. All the robust data protection standards that you're familiar with from our main services apply equally to any information handled through the app.

Additional Control Over Your App Data

As an app user, you have additional controls over your privacy and data. You can manage all app permissions through your device settings, controlling exactly what the app can access. If you wish to remove app-specific data, you can do so without affecting your main Mattioli Woods account. We've also made it possible to export any data you've entered through the app separately from your main account information. You have full control over app notifications and communications preferences.

Data Retention and Management

We maintain different retention periods for different types of app data, always ensuring we keep information only as long as necessary. Session data from the app is deleted after 30 days, as it's no longer needed for security purposes. We retain app usage statistics for 12 months to help us improve the service and identify any long-term patterns that might indicate security concerns. Any documents you upload through the app are retained according to our main privacy policy retention schedules, ensuring compliance with financial regulations and your service agreements.