

**FACTS****WHAT DOES MARZO CAPITAL GROUP, INC. DO WITH YOUR PERSONAL 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 collect and share depend on the product or service you have with us. This information can include:

- Social Security number and income
- Investment experience and wire transfer instructions
- Risk tolerance and checking account information

**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 Marzo Capital Group chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does MCG Share?	Can you limit this sharing?
<b>For our everyday business purposes</b> – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
<b>For our marketing purposes</b> – to offer our products and services to you	Yes	No
<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	Yes	No
<b>For our affiliates' everyday business purposes</b> – information about your creditworthiness	No	N/A
<b>For nonaffiliates to market you</b>	No	N/A

**Questions?**

Call 888.495.7355 or go to <https://www.marzocapitalgroup.com/contact.php>

## Who we are

### Who is providing this notice?

Marzo Capital Group, Inc.

## What we do

### How does CrowdStreet protect my personal information?

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.

### How does CrowdStreet collect my personal information?

We collect your personal information, for example, when you

- Make a wire transfer or give us your income information
- Open an account or give us your contact information
- Enter into an investment advisory contract

### Why can't I limit all sharing?

Federal law gives you the right to limit only

- Sharing for affiliates' everyday business purposes– information about your creditworthiness
- Affiliates from using your information to market to you
- Sharing for nonaffiliates to market to you

State laws and individual companies may give you additional rights to limit sharing.

## Definitions

### Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- Our affiliates include companies with a Marzo Capital Group name, including: Marzo Capital Group, Inc. and Marzo Capital Group

### Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- Marzo Capital Group does not share with nonaffiliates.

### Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- Marzo Capital Group does not jointly market.