



Mason Companies Privacy Policy — Site Visitors

Last Updated: August 2025

Mason Investment Advisory Services, Inc. (along with Mason International, Inc. and affiliated companies, collectively “Mason”) is committed to respecting your privacy. This Privacy Policy applies to individuals and entities accessing the Site (“you”), and it describes how we collect, use, share and disclose Personal Information we collect on our website (the “Site”).

Note for California Residents:

This Privacy Notice and Cookie Statement describes how we process your Personal Information and your rights and choices over our processing. Please see Section 9 below for specific details on your rights under California law.

Note to European Union Residents:

The Mason Websites are not intended for use by residents of the European Union.

Consent and Modifications

By accessing, visiting or using the Site, you acknowledge your understanding of this Privacy Policy. If you do not agree with the contents of this Privacy Policy, you should not access, visit and/or use the Site.

This Privacy Policy may be modified at any time without prior notice to you. Your continued access, visitation or use of the Site will constitute your acceptance of any changes or revisions to this Privacy Policy.

If you become a customer of Mason, our collection and use of your data are further subject to our customer privacy notice, found here.

Definitions of Terms Used in this Policy

- “CCPA” means the California Consumer Privacy Act of 2018, Cal. Civil Code § 1798.100 et seq. and its implementing regulations.
- “Device” means any computer, tablet, mobile phone, or any other device capable of accessing the Site.
- “Personal Information” means information that identifies, relates to, describes, is reasonably capable of being associated with, or could reasonably be linked, directly or

indirectly, with a particular consumer, Device, or household. Anonymous, de-identified, or aggregate information is not Personal Information.

- “Service Provider” has the same meaning as set forth in the CCPA, which in general means a for-profit legal entity to whom we disclose Personal Information for processing on our behalf for a “business purpose” (as defined in the CCPA) pursuant to a written contract.
- “Third-Party Business” means any third party unaffiliated with us to whom we disclose Personal Information for their own purposes.

Categories of Your Personal Information that We May Acquire

We may collect, obtain or otherwise acquire the following types of Personal Information about you, and we may make and retain inferences drawn from such information:

How We Source Your Personal Information

From Personal Information You Provide:

We collect Personal Information when you choose to share that information with us when you:

- Give us your contact information, whether by completing the “Contact Form” or registering for an Event or Webinar

From What We Automatically Collect:

As is true of most websites, we can gather certain information automatically and store it in log files. This information may include IP addresses, browser type, internet service provider, referring/exit pages, operating system, date/time stamp and/or clickstream data. We generally only use this data for purposes such as Site management and administration, security, fraud detection and protecting our rights.

From Cookies and Other Data Collection Technologies:

We and our service providers use cookies and similar technologies to manage our websites and to collect information about you and your use of our Site. A “cookie” is a small software file stored temporarily or placed on your computer’s hard drive. These technologies help us to recognize you, customize or personalize your experience and analyze your use of our Site to make it more useful to you. These technologies also allow us to aggregate demographic and statistical data and provide this information to our service providers to facilitate their provision of services.

Most Internet browsers allow you to remove or manage cookie functions and adjust your privacy and security preferences. For information on how to do this, access the “help” menu on your Internet browser, or visit <http://www.aboutcookies.org/how-to-control-cookies>. Please note, however, that disabling our cookies may result in your inability to take full advantage of all of the features of our Site.

How We Use Your Personal Information

Processing Your Requests:

We use your Personal Information to process your requests.

Administering the Site:

We use and share your Personal Information for any lawful purpose in connection with managing our Site, including Site management and administration, security, fraud detection, customer service, system maintenance and improvement, or to improve our Site.

Information for Analytics:

We use analytics providers such as Google Analytics to help us evaluate and measure the use and performance of the Site. To opt-out of the aggregation and analysis of data collected about you while using the Site by Google Analytics, visit <https://tools.google.com/dlpage/gaoptout> and download and install the Google Analytics Opt-out Browser Add-on.

Legal Process, Safety and Terms Enforcement:

We may disclose your Personal Information to legal or government regulatory authorities in response to their requests for such information or to assist in investigations. We reserve the right to disclose or report to law enforcement agencies any activities that we, in good faith, believe to be unlawful. We may also disclose your Personal Information to third parties in connection with claims, disputes or litigation, when otherwise required by law, or if we determine its disclosure is necessary to protect the rights, property and safety of us or others, or to enforce our legal rights or contractual commitments that you have made.

Sharing of Your Personal Information with Third Parties**Third Parties with Whom We May Share Your Personal Information:**

We may disclose your Personal Information to the following categories of third parties:

- Service Providers
- Third-Party Businesses
- Affiliates
- Governmental and law enforcement officials
- Persons involved in an acquisition of our business or assets

Service Providers:

We may share your Personal Information with third-party service providers who perform services on our behalf or for your benefit, but only for the purpose of and to the extent necessary to perform those services.

Third-Party Business Purposes:

We may share or transfer your Personal Information to third-parties for our everyday business purposes, including:

- Advertising, marketing and sponsorship clients to market their goods and services;
- Consumer data suppliers/resellers, data enrichment providers and aggregators;
- Social media and social networking services; and
- Businesses that assist us with our services.

Legal Process, Safety and Terms Enforcement:

We may disclose your Personal Information to legal or government regulatory authorities in response to their requests for such information or to assist in investigations. We reserve the right to disclose or report to law enforcement agencies any activities that we, in good faith, believe to be unlawful. We may also disclose your Personal Information to third parties in connection with claims, disputes or litigation, when otherwise required by law, or if we determine its disclosure is necessary to protect the rights, property and safety of us or others, or to enforce our legal rights or contractual commitments that you have made.

Affiliates' Purposes:

We may share your Personal Information with legal entities that are affiliated with us, including our parent, subsidiaries, and other related entities, and our advisors, including lawyers, consultants, accountants, and others. Our affiliates may use your Personal Information for their everyday business purposes, for all purposes described in Section VII. We may also share your Personal Information with our affiliates for our affiliates to market to you to make you aware of products you may be interested in.

Marketing Communications:

We may use your Personal Information to communicate with you about new features, events or services offered by us and Third-Party Businesses, including our advertising, marketing and sponsorship clients.

Business Transfers or Sale of Our Business:

Your Personal Information may be disclosed, as permitted by law, as part of a corporate business transaction, such as a merger, acquisition, joint venture, or financing or sale of company assets, including bankruptcy proceedings, and could be transferred to a third party as one of the business assets in such a transaction. We may also share your Personal Information to legal, financial, insurance, or other advisors in connection with such business transaction or management of all or part of our business or operations.

Health, Safety, and Legal Requests:

We may share your Personal Information for purposes of health, safety and other matters in the public interest. We may also share your Personal Information to cooperate with official investigations or legal proceedings brought by or otherwise involving governmental and/or law enforcement officials, as well as private parties, including, for example, in response to subpoenas, search warrants, court orders, or other legal process. We may also use Personal Information to protect our rights and property and those of our agents, customers, and others, including to enforce our agreements, policies, and terms of use.

Links to Other Web Applications:

The Site may contain links to other web applications that are not owned or controlled by Mason. Please be aware that we do not determine and are not responsible for the privacy practices or content of such other sites. We encourage you to be aware when you leave the Site and read the privacy statements of other web applications linked to the Site. This Privacy Notice applies only to information collected by the Site.

Username and Passwords:

You may not be able to access certain portions of the Site until you have entered a username and password. You are solely responsible for maintaining the secrecy of your password and other account information. To maximize your protection, you should choose a complex password that you do not use with any other service.

Transfer of Your Personal Information Among Jurisdictions

Your Personal Information may be processed, transferred to, and maintained on, servers and databases located outside of the jurisdiction in which you are based and where the privacy laws may not be as protective as your jurisdiction. We have put in place appropriate safeguards (such as contractual commitments) in accordance with applicable legal requirements to ensure that your data is adequately protected. For more information on the appropriate safeguards in place, please see the “How to Contact Us” section below and send us an inquiry.

Protection of Your Personal Information**Security Measures:**

We take reasonable security measures to protect against unauthorized access to, or unauthorized alteration, disclosure or destruction of, Personal Information.

No Liability for Breach:

Because no security system is impenetrable, we cannot guarantee the security of your Personal Information. By using the Site, you agree to assume all risk in connection with your Personal Information. We are not responsible for any loss of such Personal Information or the consequences thereof.

Breach Notification:

If we believe the security of your Personal Information in our possession or control may have been compromised, we may seek to notify you subject to applicable laws and regulations governing such notifications.

Retention:

We will retain your Personal Information for as long as it is reasonably useful for commercial purposes. We will retain and use your Personal Information as necessary to comply with our legal obligations or data retention policies, resolve disputes, and enforce our agreements.

Notice to California Customers — Your Privacy Rights**Rights of California Residents:**

The CCPA grants residents of California certain rights with respect to their Personal Information. California residents have the following rights under the CCPA:

- the right to the categories of Personal Information we have collected about you;
- the right to know the categories of sources from which Personal Information is collected, sold or shared, and to whom;

- the right to know our business or commercial purpose for collecting, selling, or sharing your Personal Information;
- the right to know the categories of third parties to whom we disclose your Personal Information;
- the right to request specific pieces of your Personal Information that we hold;
- the right to request the deletion of your Personal Information, subject to several exceptions;
- the right to opt out of the sale of your Personal Information;
- the right to request that we correct inaccurate Personal Information that we have about you;
- the right to request that we limit the use and disclosure of sensitive personal information collected about you; and
- the right to not be unlawfully discriminated against for exercising these rights.

We may take reasonable steps to verify your identity before fulfilling your request to know or delete. For example, we may seek to establish your identity by matching information that you submit alongside your request with information that we have on our records. We may also ask for supplemental information as needed to establish your identity.

Exercising Your Rights Under the CCPA:

California residents, as well as authorized agents seeking to submit requests on behalf of California residents and parents or guardians seeking to submit requests on behalf of their minors who are residents of California, may exercise the rights described below by contacting us at compliance@masoncompanies.com or by calling us at 703-716-6000.

You have the right to request that we delete any of your Personal Information that we collected from you and retained, subject to certain exceptions. Once we receive and confirm your verifiable consumer request, we will delete (and direct our service providers to delete) your Personal Information from our records, unless an exception applies. We may deny your deletion request if retaining the information is necessary for us or our service provider(s) to:

- Complete the transaction for which we have collected the Personal Information, provide a good or service that you requested, take actions reasonably anticipated within the context of our ongoing business relationship with you, fulfill the terms of a written warranty or product recall conducted in accordance with federal law, or otherwise perform our contract with you.
- Detect security incidents, protect against malicious, deceptive, fraudulent, or illegal activity, or prosecute those responsible for such activities.
- Debug products to identify and repair errors that impair existing intended functionality.
- Exercise free speech, ensure the right of another consumer to exercise their free speech rights, or exercise another right provided for by law.
- Comply with the California Electronic Communications Privacy Act (Cal. Penal Code § 1546 et. seq.)

- Engage in public or peer-reviewed scientific, historical, or statistical research in the public interest that adheres to all other applicable ethics and privacy laws, when the information's deletion may likely render impossible or seriously impair the research's achievement, if you previously provided informed consent.
- Enable solely internal uses that are reasonably aligned with consumer expectations based on your relationship with us.
- Comply with a legal obligation.
- Make other internal and lawful uses of that information that are compatible with the context in which you provided it.

If you opt out of the sale of your Personal Information, we may still share your Personal Information with third parties if those transfers are not sales, such as with our Affiliates or our Service Providers.

Consumers' Right to Know What Personal Information is Sold or Shared and to Whom:

The CCPA gives California residents the right to ask us to disclose (1) the categories of Personal Information that we collect about our consumers; (2) the categories of Personal Information that the business sold or shared about the consumer and the categories of third parties to whom the Personal Information was sold or shared, by category or categories of personal information for each category of third parties to whom the personal information was sold or shared; and (3) the categories of personal information that the business disclosed about the consumer for a business purpose and the categories of persons to whom it was disclosed for a business purpose.

If you are a California resident and would like a to request this notice, please submit a written request to the email or regular mail address provided in the "How to Contact Us" section below.

Categories of Personal Information We Disclose or Sell:

We retain records of your Personal Information for as long as necessary to comply with legal and regulatory obligations. In the preceding 12 months, we have not shared, disclosed, or sold Personal Information for business purposes.

Response Timing and Procedures:

We endeavor to respond to a verifiable consumer request within forty-five (45) days of its receipt. If we require more time (up to 90 days), we will inform you of the reason and extension period in writing. We will deliver our written response by mail or electronically, at your option.

Any disclosures we provide will only cover the 12-month period preceding the verifiable consumer request's receipt. The response we provide will also explain the reasons we cannot comply with a request, if applicable. For data portability requests, we will select a format to provide your Personal Information that is readily useable and should allow you to transmit the information from one entity to another entity without hindrance.

We do not charge a fee to process or respond to your verifiable consumer request unless it is excessive, repetitive, or manifestly unfounded. If we determine that the request warrants a fee,

we will tell you why we made that decision and provide you with a cost estimate before completing your request.

Do Not Track:

California Business & Professions Code Section 22575(b) provides that California residents are entitled to know how a website operator responds to “Do Not Track” (“DNT”) browser settings. DNT is a feature offered by some browsers which, when enabled, sends a signal to websites to request that your browsing is not tracked, such as by third party ad networks, social networks and analytic companies. We do not currently take actions to respond to DNT signals because a uniform technological standard has not yet been developed. We continue to review new technologies and may adopt a DNT standard once one is created. For information about DNT, visit [All About DNT](#).

Shine the Light:

California’s “Shine the Light” law, Cal. Civil Code §1798.83, gives California customers the right to prevent our disclosure of their Personal Information to third parties for those third parties’ direct marketing purposes, and requires certain businesses to respond to requests from California customers asking about the business’ practices related to disclosing Personal Information to third parties for the third parties’ direct marketing purposes. Alternately, such businesses may have in place a policy not to disclose Personal Information of customers to third parties for the third parties’ direct marketing purposes if the customer has exercised an option to opt-out of such information-sharing. We have such a policy in place.

To Persons Who Reside Outside the United States

This Site is not intended for use by Residents outside the United States and as such we are not subject to any extraterritorial regulations. Nothing on this Site should be considered a solicitation to buy or an offer to sell services in any jurisdiction where the offer or solicitation would be unlawful under the securities laws of such foreign jurisdiction or the United States.

Children’s Privacy

Our Site is not directed to, and we do not intend to or knowingly collect or solicit Personal Information online from children under the age of 13. If a child under 13 has provided Personal Information to us, we encourage the child’s parent or guardian to contact us through the contact information provided below to request that we remove the information from our systems. If you are under the age of 13, do not provide us with any Personal Information.

Changes to This Policy

This Privacy Notice is subject to occasional revision, and if we make any material changes in the way we use your Personal Information, we will notify you by prominently posting notice of the changes on the Site and updating the revision date below.

Any changes to this Privacy Notice will be effective upon thirty (30) calendar days following our posting of notice of the changes on the Site. These changes will be effective immediately for new users of our Site.

If you do not wish to permit changes in our use of your Personal Information, you must notify us prior to the effective date of the changes so we can delete your Personal Information. Following notice of such changes, continued use of our Site shall indicate your acknowledgment of such changes and agreement to be bound by the terms and conditions of such changes.

How to Contact Us

If you have any questions or comments about this Privacy Notice or other privacy-related matters, you may contact us in the following ways:

Phone: 703-716-6000

Email: compliance@masoncompanies.com

Standard Mail

Mason Companies

Attn: Jack Delaney

11921 Freedom Drive, Suite 1000

Reston, VA 20190

Please include your name, contact information, and the specific website, mobile site, application, and/or other service in your request.

Only inquiries about this Privacy Policy or your Personal Information should be sent to the address above. No other communications will be accepted or responded to.