



FACTS

WHAT DO MANGOTREE CAPITAL, LLC AND AFFILIATED COMPANIES (COLLECTIVELY, THE “MANGOTREE”) 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 financial account numbers
- Account balances and transaction information
- Income, employment, assets, and liabilities information

When you are *no longer* our customer, we continue to share your information as described in this notice.

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 MangoTree chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does MangoTree share?	Can you limit this sharing?
For our everyday business purposes— such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes— to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	We do not share
For our affiliates' everyday business purposes— information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes— information about your creditworthiness	No	We do not share
For our affiliates to market to you	No	We do not share
For nonaffiliates to market to you	No	We do not share

Questions?

Call 844-626-4637 or go to www.mangotreecapital.com

Who we are

Who is providing this notice?

MangoTree Capital, LLC and MangoTree Benefits, LLC (collectively, the “MangoTree”)

What we do

How does MangoTree 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 MangoTree collect my personal information?

We collect your personal information, for example, when you

- open an account or make deposits or withdrawals from your account
- when we buy or sell your securities per your portfolio management or advisory agreement with us
- tell us about your investment or retirement portfolio

We also collect your personal information from others, such as account custodians, affiliates, or other companies.

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.

What happens when I limit sharing for an account I hold jointly with someone else?

Your choices will apply to everyone on account.

Definitions

Affiliates

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

- our affiliates include MangoTree Capital, LLC and MangoTree Benefits, LLC.

Nonaffiliates

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

- MangoTree does not share with nonaffiliates so they can market to you.

Joint marketing

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

- MangoTree does not jointly market.

Other important information

If you recently moved or changed your contact information, please contact us to update your information.

This privacy notice applies to the following affiliated companies, to the extent they do not have their own privacy notices: MangoTree Capital, LLC and MangoTree Benefits, LLC. Investment advisory services are provided exclusively by MangoTree Capital, LLC and insurance products (life, health and annuities) are provided exclusively by MangoTree Benefits, LLC. The notice does not constitute a contract, nor does it modify or amend any agreement we have with you. MangoTree® is a trademark owned by MangoTree Capital, LLC. Copyright © 2026 MangoTree Capital, LLC.