

Privacy Policy
The Advise Us Fund

The Advise Us Fund (“**AUF**”) is committed to maintaining your privacy. This privacy policy and agreement (our “**Privacy Policy**”) specifies the personal information that we ask you to provide in order to participate in the services we offer and governs how we treat this personal information.

PLEASE READ THIS PRIVACY POLICY CAREFULLY. YOUR CONSENT TO THE TERMS OF THIS PRIVACY POLICY CREATES LEGAL OBLIGATIONS FOR YOU AND FOR US. PLEASE READ SECTION 2 (YOUR CONSENT) TO LEARN WHAT CONSTITUTES “CONSENT” UNDER THIS PRIVACY POLICY. IF YOU DO NOT AGREE WITH THE TERMS OF THIS PRIVACY POLICY, PLEASE REFRAIN FROM USING OUR SITE.

1. Who We Are and What We Do

Our website (the “**Website**” or the “**Site**”) exists to educate donors about planned and donor-advised giving and bring these techniques to grass roots charities (“**Charitable Services**”). The website allows users who register at our Site (each a “**Registered User**”) to make contributions to their charities of choice by way of outright gifts (donor-advised funds or endowed gifts), or gifts in trust (charitable lead trusts or charitable remainder trusts).

2. Your Consent

You indicate your consent to the terms of this Privacy Policy in different ways, depending on your relationship to the Site. The procedures for consenting to this Policy are (a) less formal if you are simply a casual site visitor who has not completed the registration process (“**Site Visitor**”), and (b) more formal if you are seeking to become a Registered User.

2.1 Consent by Site Visitor. By accessing and using our Website as a Site Visitor, you are acknowledging that you have read and understood this Privacy Policy and agree to be legally bound by it.

2.2 Consent by Registered Users. If you register as a Registered User on our Site, during the registration process you will be prompted to click a “checkbox” confirming that you have had an opportunity to review this Policy, and that you agree to its terms. Clicking this checkbox confirms your agreement to be bound by this Privacy Policy. You are permitted to register only in your capacity as an individual, and we do not allow users to register on behalf of a group or organization.

3. A Site Visitor Does Not Provide Personally Identifiable Information

We have structured our Website so that, as a casual Site Visitor, you may come to our Site and review selected information about our Charitable Services without revealing your identity or providing any personally identifying information. It is only where you wish to become a Registered User or make a gift to AUF that we require you to provide personally identifiable information.

4. A Registered User Will Provide Contact Information, and Other Similar Personally Identifiable Information

To provide our Charitable Services to Registered Users, we obtain the following personally identifiable information:

4.1 Registration Information. In order to access our Charitable Services as a Registered User we require that you complete a registration form. Our registration form will specify the information which you must provide in order to enjoy our Charitable Services, which may include such items as (i) name; (ii) email address; (iii) mailing address; and (iv) birth date (for COPPA and eligibility purposes) (collectively "**Contact Information**"). Our registration forms may additionally request information which you may, at your option, choose to provide or withhold. To the extent this additional information constitutes personally identifiable information, we will treat it in the manner specified in this Privacy Policy.

4.2 Completing Your Registration as a Registered User; User Passwords. Upon completion of our registration process, you will receive a username and password, which will allow you to gain access to the password-protection section of the site where you can, among other things, make charitable gifts to AUF.

5. How We Use Your Personally Identifiable Information. We use your personally identifiable information in the operation of our Website, and to comply with Applicable Law. You cannot participate in our Site if you seek to opt-out of these uses of your Information.

5.1 We Do Not Sell information. AUF will not sell, trade, or share personal information about our users with anyone else.

5.2 We Do Not Use Cookies. We do not send persistent cookies to your computer or use other technologies that track usage behavior.

5.3 Processing Gifts. When you give a gift to AUF, we collect your name, contact information, standard credit card data and brokerage information.

5.4 Providing You With Information. Periodically, we might like to send you materials for informational purposes, including email, newsletters, bulletins, marketing materials or other information to our Registered Users. We collect contact information to deliver this information to our Registered Users, and we periodically solicit recipients of newsletters for an operating gift or donor-advised fund. If we choose to undertake such communications, you may choose to opt-out of receiving these communications.

6. There Are Strictly Limited Circumstances Where Certain Third Parties Have Access To Personally Identifiable Information

6.1 Service Providers; Required Disclosures. On occasion, AUF may share information about our users with vendors and service providers ("**Service Providers**") to assist us with the operation of our Site. These Service Providers help us with functions such as managing data and processing donations. We will share with our Service Providers only that information necessary for them to perform their functions, and we require them to commit to refrain from using your personally identifiable information for any other purpose.

6.2 Required Disclosures. We may reveal your personally identifiable information to attorneys, private investigator organizations or law enforcement agencies if we believe that you are violating (either intentionally or unintentionally) our Terms and Conditions of Use or are otherwise violating legal rights. Additionally, AUF will reveal your personally identifiable information to the extent we reasonably believe we are required to do so by law.

7. How We Safeguard Your Personally Identifiable Information. We have put in place security systems designed to prevent unauthorized access to or disclosure of Personally Identifiable Information, and we take all reasonable steps to secure and safeguard this Information, including our Site's password-protected section that requires users to give us unique identifiers such as their user ID and password. We also provide access to our databases containing personally identifiable information on a need-to-know basis only. Please understand, though, that due to the nature of Internet communications and evolving technologies, we cannot provide and we also disclaim assurance that the information you provide us will remain free from loss, misuse, or alteration by third parties who, despite our efforts, obtain unauthorized access.

8. Participation by Children and Teens; Advisory

Due to federal law (as reflected in the Children's Online Privacy Protection Act), WE DO NOT ALLOW INDIVIDUALS WHO WE KNOW ARE UNDER 13 TO PARTICIPATE IN OUR SITE OR CHARITABLE SERVICES. YOU MUST BE AT LEAST 13 YEARS OLD TO USE OUR SITE AND CHARITABLE SERVICES. Please understand that we cannot necessarily tell if a user is providing us with his or her true age.

9. Notification of Changes

From time to time, AUF may change its Privacy Policy. If we make any changes regarding disclosure of personally identifiable information to third parties, we will attempt to contact you prior to the date the modified policy is scheduled to take effect. We will post notice of the new Policy from the privacy link on our Website. With respect to Site Visitors, your use of our Site following any such change constitutes your agreement to follow and be bound by the Privacy Policy, as changed. With respect to Registered Users, no such changes will take effect unless and until you have provided us with your consent to such changes, in accordance with Section 2.2, above.

10. Relationship to Terms of Use and Other Contracts; Incorporation of Terms of Use

This Privacy Policy must be read in conjunction with our Terms of Use, and the provisions of our Terms and Conditions are incorporated herein. To the extent the Terms and Conditions of Use conflict with the terms of this Privacy Policy, the terms of this Privacy Policy will control.

11. Third Party Links; Advertisers

We may allow certain corporations, advertisers, and other entities to place ads and information on our Site (collectively, "**Corporate Participants**"). Although we have permitted the Corporate Participants to exchange information on our Site, we are not responsible for your choice to contact or do business with them. Your correspondence and dealings with Corporate Participants, and any other terms, conditions, warranties, or representations associated with such dealings, are solely between you and the Corporate Participant, and you agree that AUF

shall not be responsible or liable for any loss or damage incurred as the result of your dealings with Corporate Participants.

12. Termination; Duration of Rights

You are entitled to terminate this Privacy Policy at any point. We will continue to protect your personally identifiable information under the terms of this Privacy Policy, for the duration of the period that this information is in our possession, or under our control. Our Terms of Use will survive a termination of this Privacy Policy (in accordance with their terms), and continue to govern any ongoing obligations or limitations on our relationship.

13. Transfer of Site

AUF shall be entitled to transfer to a third party information it collects, including any Personally Identifiable Information, in connection with a sale of all or substantially all of the assets of the business entity responsible for the information under this Policy, provided the acquiring third party has agreed to safeguard your personally identifiable information with protections that in all material respects are the same as, or more protective than, those set out in this Privacy Policy.

14. Contact Us

If you have any questions about this Privacy Policy, the practices of this Site, or your dealings with this Website, please contact us at:

Mail:

Advise Us Fund
934 Belleforte Ave.
Oak Park, IL 60302

Phone:

(708) 763-0335

15. Effective Date

The effective date of this Privacy Policy is October 13, 2013.