

PRIVACY POLICY

www.velariscfo.com

This Privacy Policy explains how Velaris Consulting, LLC ("Velaris," "we," "us," or "our") collects, uses, discloses, and retains personal information when you use www.velariscfo.com (the "Site"). The Site provides information about our strategic financial consulting services and is intended for business representatives and other adults.

Effective date: July 12, 2026

Last updated: July 12, 2026

This Privacy Policy applies in addition to our Terms and Conditions, available on the Site.

Acknowledgment

This Privacy Policy describes our practices as a notice to you. It is not a contract by which you consent to all processing merely by visiting the Site. Where consent is required by applicable law, we will request it separately at the appropriate time. When you submit information through a form on the Site, you acknowledge that we will process that information as described in this Privacy Policy.

Personal Data We Collect

We only collect data that helps us achieve the purposes set out in this Privacy Policy. We will not collect additional categories of data beyond those described below without updating this Privacy Policy or notifying you.

Data You Provide Directly

When you complete the assessment form or request to schedule a session on our Site, we collect:

- Your first and last name;
- Your email address; and
- The responses you provide to the questions in our assessment form, which relate to your company's financial situation and upcoming plans.

When you book a session, our scheduling provider also collects the information needed to schedule the meeting, such as your selected time and any details you enter into the booking form.

Please do not submit bank-account credentials, payment-card information, Social Security numbers, tax-identification numbers, passwords, protected health information, privileged communications, or other highly sensitive information through general Site forms.

This Privacy Policy covers information you provide as a prospective client through the public Site. If you become a client, the confidential information you share with us in the course of an engagement is governed by your signed engagement agreement and any client-facing confidentiality or data-security terms, rather than by this public Site policy.

Data Collected Automatically

When you visit our Site, we and our analytics providers may automatically collect technical and usage information through cookies and similar technologies. This information may include your device type, browser type, approximate location derived from your IP address, the pages you view, the links you click, and how you arrived at our Site. We primarily use the resulting reports and insights on an aggregated basis to understand and improve how the Site is used.

How We Use Personal Data

We use the data we collect to:

- Understand your situation and prepare for a consultation with you;
- Respond to your inquiries and schedule sessions;
- Analyze, on an aggregated and de-identified basis, the challenges most relevant to the founders we serve, in order to improve our Site and services; and
- Understand and improve how visitors use our Site.

We do not use your individual assessment responses for advertising.

How We Disclose Personal Data

We do not sell personal information for monetary consideration. We also do not share personal information for cross-context behavioral advertising. We disclose personal information to service providers and other recipients for the business purposes described in this Privacy Policy.

Service Providers

We use trusted third-party service providers to operate our Site and business. Depending on the function, these may include providers of:

- Website hosting and content management;
- Assessment and form processing;
- Customer-relationship management and email;
- Scheduling and videoconferencing;
- Cloud storage;
- Website analytics;
- Information-technology and security services; and

- Professional advisers, where necessary.

These providers may process your data only on our behalf and only to the extent necessary to perform their services.

Analytics and Google Analytics

We use Google Analytics, a web analytics service provided by Google LLC, to help us understand how visitors use our Site. Google Analytics uses cookies and similar technologies to collect information such as the pages you visit and how you interact with the Site, and it may use this information to evaluate your use of the Site and compile reports for us. Google may transfer this information to third parties where required to do so by law or where such third parties process the information on Google's behalf. For information on how Google uses data, see Google's Privacy Policy at policies.google.com/privacy and "How Google uses information from sites or apps that use our services" at policies.google.com/technologies/partner-sites. You can opt out of Google Analytics by installing the Google Analytics Opt-out Browser Add-on available at tools.google.com/dlpage/gaoptout.

Other Disclosures

We may also disclose personal information:

- If the law requires it;
- If it is required for any legal proceeding;
- To prove or protect our legal rights; and
- To a buyer or potential buyer of this company in the event that we seek to sell the company.

If you follow hyperlinks from our Site to another site, please note that we are not responsible for and have no control over the privacy policies and practices of those sites.

How Long We Store Personal Data

We retain the personal information you submit through the Site for as long as needed to fulfill the purpose it was collected for, and for a reasonable period afterward. For prospective clients, this period generally begins after your last meaningful interaction with us and does not exceed 24 months, unless you become a client, a longer period is required by law, or the information is needed to resolve a dispute. If you become a client, your records are governed by the retention framework in your engagement agreement rather than this policy.

We configure our website analytics with a defined retention period for event-level data and rely on aggregated reporting thereafter. When you make a deletion request, we will delete your information from our active systems promptly; residual copies may persist temporarily in routine backups until those backups are overwritten in the ordinary course.

How We Protect Your Personal Data

We maintain reasonable administrative, technical, and organizational safeguards appropriate to the nature of the information we handle. These include transmitting form submissions over encrypted (HTTPS) connections, limiting access to personal information to those who need it, and working with reputable service providers. While we take reasonable measures to protect your information, no method of transmission or storage is completely secure, and we cannot guarantee absolute security.

Your Rights

Depending on where you live, you may have the right to request access to the personal information we hold about you, request that it be corrected or deleted, and ask how it has been used and disclosed. Where applicable law provides a right to opt out of the "sale" or "sharing" of personal information, we note that we do not sell personal information and do not share it for cross-context behavioral advertising. To exercise any of these rights, contact us using the details in the "Contact Information" section below. In handling your request:

- We may need to verify your identity before responding;
- We may deny or limit a request where permitted by law;
- An authorized agent may submit a request on your behalf where applicable law allows;
- We will respond within the time required by applicable law; and
- Where a relevant state privacy law provides a right to appeal a decision, you may appeal by contacting us again.

We will not discriminate against you for exercising your privacy rights.

Children

The Site is intended for business representatives and adults and is not directed to children under 13 years of age. We do not knowingly collect or use personal information from children under 13. If we learn that we have collected personal information from a child under 13, we will delete it as soon as possible. If a child under 13 has provided us with personal information, their parent or guardian may contact us at the details below.

Cookies and Browser Controls

A cookie is a small file stored on your device by a website, used to collect information about your activity. Our Site uses cookies and similar technologies through Google Analytics, as described above. You can set your browser to notify you when cookies are transmitted or to disable cookies entirely; disabling cookies may reduce the quality of your experience on the Site. If we later add advertising or retargeting technologies, we will update this section and provide any opt-out mechanism required by applicable law.

Do Not Track

Do Not Track ("DNT") is a privacy preference you can set in certain web browsers. Because there is no consistent industry standard for interpreting DNT signals, our Site does not currently respond to browser-initiated DNT signals. You can still limit analytics tracking using the Google Analytics opt-out tool described above.

Modifications

This Privacy Policy may be amended from time to time in order to maintain compliance with the law and to reflect changes to our data practices. When we amend this Privacy Policy, we will update the "Last updated" date above. We recommend that you periodically review this Privacy Policy. Where appropriate, we may notify users of material changes.

Contact Information

If you have any questions, concerns, or complaints, or if you would like to access, correct, or delete your information, you can contact us at:

Velaris Consulting, LLC

privacy@velariscfo.com

111 Town Square Place, Ste 1238 #174978, Jersey City, NJ 07310