

Atlantis Investment Coaching, LLC

Privacy Policy

How Atlantis Investment Coaching, LLC (“Atlantis”) protects Clients’ (“Client”) personal information: Atlantis Investment Coaching, LLC, takes precautions—including administrative, technical, and physical measures—to safeguard personal information against loss, theft, and misuse, as well as unauthorized access, disclosure, alteration, and destruction. We restrict access to Clients’ personally identifiable financial information (“Nonpublic Personal Information”) to employees who need to know that information in order to provide services to Client. Atlantis also maintains physical, electronic, and procedural safeguards to protect Clients’ Nonpublic Personal Information.

Integrity of Clients’ personal information:

Atlantis has safeguards in place to keep Clients’ information complete and up to date. Only a select group of people have the ability to alter Clients’ data. Website access is strictly read-only; no changes can be made via the website.

Technologies:

The websites that Clients may access are managed and maintained by either Atlantis or Matson Money, Inc. (“Matson Money”). Matson Money’s website, <http://www.MatsonMoney.com>, our website, <https://atlantiscoaching.com>, and our website co-branded with Matson Money, <https://atlantis.breakthroughinvesting.com>, are all forced SSL sites (meaning all traffic is encrypted).

Matson Money’s website does not allow saving of login information. Matson Money requests the username and password upon each login. Matson Money maintains an integral difference between what is contained in the database and what Client and Matson Money’s Authorized Representatives can access. Full database backups are performed every night. These backups are rotated on an abbreviated GFS scheme; translating into 6 tapes for daily backups, 2 tapes for weekly backups, and 1 tape for monthly backup. This is an industry standard approach modified for limited archival retrieve based on constantly changing data. Backups are encrypted on both disk and tape using 168-bit encryption. Go to https://www.matsonmoney.com/wp-content/uploads/2022/05/MM_Standard-App_PrivacyPolicy_052022.pdf to get a copy of Matson Money’s Privacy Policy.

Company-wide commitment to privacy of Clients:

Atlantis does not sell Clients’ personal information to anyone. Atlantis collects Nonpublic Personal Information from Clients from the following sources:

- Account applications and other forms, which may include a Client’s name, address, social security number, or other information about the Client(s)
- Clients’ investment goals and risk tolerance.
- A Client’s professional advisors, such as a Client’s broker, financial planner, attorney, accountant, or an “Authorized Representative” who may provide financial or investment history and tax information about the Account.
- History of account(s), including information about the transactions Matson Money has placed for Client and balances in Client’s account(s).
- Correspondence, written or telephonic, between Client and Atlantis and/or Matson Money, or Client’s Authorized Representative, or custodian and Atlantis and/or Matson Money.

Atlantis does not disclose any Nonpublic Personal Information about Client to any entity that is not an affiliate of, or related by common ownership or affiliated by corporate control (“Unaffiliated Third Party”) with Atlantis, except as permitted or required by law. Accordingly, Atlantis may disclose all of the information Atlantis collects about the Client or the Client’s account(s), as described above, under the following circumstances:

- Atlantis receives a Client’s prior consent.
- Atlantis believes the recipient to be an Client’s Authorized Representative.
- The recipient is an Authorized Representative, custodian, or other service provider with whom we must share information in order to manage or service a Client’s account properly.
- The recipient is an Unaffiliated Third Party that performs marketing services on Atlantis’s behalf, and
- Atlantis is required by law to release the information to the recipient.

Atlantis will only use information about Client and Client’s account(s) to:

- Service Client’s investment and financial needs.
- Manage and service Client’s account(s).
- Administer Atlantis’s business.

Atlantis will adhere to the policies and practices described in this policy whether Client is a current or non-current Client of Atlantis.

If Nonpublic Personal Information is requested by someone other than an Authorized Representative, Atlantis will verify Social Security number and date of birth of Client prior to release of said information. This type of request would occur in the event Client closes account(s) and assets are being transferred to a new investment firm.

Atlantis Investment Coaching, LLC

Privacy Policy

FACTS	WHAT DOES ATLANTIS 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?	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include</p> <ul style="list-style-type: none"> Social Security number and income Account balances and payment history Credit history and credit scores <p>When you close your account, we continue to share information about you according to our policies.</p>
How?	All financial companies need to share customers' personal information to run their everyday business—to process transactions, maintain customer account, and report to credit bureaus. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons Atlantis chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Atlantis Share?	Can you limit this sharing?
For our everyday business purposes: to process your transactions, maintain your account, and report to credit bureaus	Yes	No
For our marketing purposes: to offer our products and services to you	No	We don't share
For joint marketing with other financial companies	No	We don't 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 don't share
For our affiliates to market to you	No	We don't share
For non-affiliates to market to you	No	We don't share

Contact Us	info@atlantiscoaching.com
------------	--