

**Effective Date:** March 23, 2026

**Website:** [advisorscalecon.com](https://advisorscalecon.com)

Advisor ScaleCon ("we," "our," or "us") respects your privacy and is committed to protecting your information. This Privacy Policy explains what we collect, how we use it, and how we share it in connection with Advisor ScaleCon events, including **Advisor ScaleCon Series: Elevate and Advisor ScaleCon: The Playbook**.

## 1. INFORMATION THAT WE COLLECT

We collect information you voluntarily provide to us, as well as limited data collected automatically through your use of our website.

### Information You Provide

When you register for an event, join our email list, or submit a form, we may collect:

- Name
- Email address
- Phone number
- Company or firm name
- Job title
- Any information you provide in surveys or application forms

### Payment Information

If you register for a paid event, payments are processed securely through Stripe. We do not store your payment card details.

### Automatically Collected Information

- When you visit our website, we may collect:
- IP address
- Browser type and device information
- Pages visited and time on site
- Referring URLs

This data is collected through cookies and similar tracking technologies.

## 2. HOW WE USE YOUR INFORMATION

We use your information to:

- Register and manage your participation in events
- Communicate with you about events, updates, and logistics
- Send marketing emails and content related to Advisor ScaleCon
- Improve our website, content, and user experience
- Measure the effectiveness of our marketing and advertising

You can unsubscribe from marketing emails at any time using the link in those emails.

### 3. COOKIES AND TRACKING TECHNOLOGIES

We use cookies and similar technologies to understand how visitors interact with our site and to improve our marketing efforts.

#### **Analytics**

We use **Google Analytics** to analyze website traffic and usage patterns.

#### **Advertising and Retargeting**

We use the **LinkedIn Insight Tag** to:

- Measure the effectiveness of our advertising
- Deliver relevant ads to visitors on LinkedIn

This may result in you seeing Advisor ScaleCon ads on LinkedIn after visiting our website.

We may add additional advertising tools (such as Meta/Facebook Pixel) in the future, and this policy will apply to similar technologies.

You can control cookie settings through your browser preferences.

### 4. Sharing of Information

We do not sell your personal information.

However, we may share your information in the following ways:

#### **Event Sponsors**

If you register for or attend an Advisor ScaleCon event, we may share the following information with event sponsors:

- Name
- Email address
- Company/firm name
- Job title
- Event attendance status

This information may be shared before and after the event.

#### **Service Providers**

We use trusted third-party providers to operate our business, including:

- Stripe (payment processing)
- Flodesk (email communications)
- Wealthbox (CRM)
- Google Analytics (analytics)
- LinkedIn (advertising)
- WordPress / WP Engine (website hosting and infrastructure)

These providers process information on our behalf and are required to protect it.

## 5. Data Retention

We retain your information as long as necessary to:

- Provide our services
- Maintain business and event records
- Communicate with you about future events and content

You may request deletion of your information at any time (see Section 7).

## 6. Data Security

We take reasonable administrative and technical measures to protect your information. However, no system is completely secure, and we cannot guarantee absolute security.

## 7. Your Privacy Rights (Including California Residents)

Depending on your location, you may have the right to:

Request access to the personal information we hold about you  
Request correction or deletion of your information  
Opt out of marketing communications

To make a request, contact us at:

**[scale@advisorscalecon.com](mailto:scale@advisorscalecon.com)**

We will respond within a reasonable timeframe.

## 8. Children's Privacy

Advisor ScaleCon is intended for professionals and is not directed to individuals under the age of 13. We do not knowingly collect personal information from children.

## 9. Changes to This Policy

We may update this Privacy Policy from time to time. Updates will be posted on this page with a revised effective date.

## 10. Contact Us

If you have questions about this Privacy Policy or how your information is handled, contact us at:

**[scale@advisorscalecon.com](mailto:scale@advisorscalecon.com)**