Data Retention and Deletion Policy

Optionality Ventures LLC

Optionality Ventures LLC maintains a data retention and deletion policy designed to minimize the storage of consumer financial data and to comply with applicable privacy and data protection laws.

Data Minimization

Optionality collects and stores only the financial data necessary to provide user requested portfolio analytics, net worth tracking, and financial insight features.

Retention Period

Financial account data retrieved via authorized integrations is retained only while the user maintains an active account with Optionality. Inactive accounts may have associated financial data removed after a defined period of inactivity.

User Initiated Deletion

Users may request deletion of their data at any time by:

1. disconnecting linked financial accounts

2. deleting their Optionality account

3. contacting support or the security contact email

Upon verified request, consumer financial data is removed from production systems within a reasonable operational timeframe.

Access Revocation

Users can revoke data access permissions through the application or directly via their financial institution. Once access is revoked, Optionality stops data synchronization and initiates deletion workflows where applicable.

Security and Storage

Retained financial data is protected using industry standard safeguards including encryption in transit and at rest, access controls, and secure cloud infrastructure.

Policy Review

This policy is periodically reviewed and updated as Optionality's services evolve and as regulatory requirements change.