

Privacy Policy

Effective Date: May 8, 2024

Last Updated: Mar 30, 2026

This Privacy Policy explains how Avante Health, Inc. (“**Avante**,” “**we**,” “**our**,” and/or “**us**”) collects, uses, and discloses information from users of our services, including visitors to our website (“**Visitors**”), individuals who use our benefits platform and related product integrations through their employer’s subscription (including employee beneficiaries or account administrators who administer platform functions and integrations on behalf of their employer) (collectively, “**End Users**”). References to “**you**” or “**your**” in this Privacy Policy should be read as collective references to End Users, Visitors, and other users of our services.

This Privacy Policy applies to information we collect when you access and use our platforms, services, and other online resources that we may offer from time to time which link to or otherwise incorporate this Privacy Policy by reference (collectively the “**Services**”). “**Services**” include our applications (“**Site**”), and product integrations such as our benefits mailbox tool (“**Integrated Products**”).

This Privacy Policy is incorporated into and forms a part of the terms of service or agreement referencing and/or linking to this Privacy Policy and applicable to your use of our Services. By accessing or using the Services, (1) you agree to the collection and use of data on the terms set forth in this Privacy Policy, and (2) you acknowledge and confirm that you have permission to provide us with all personal information submitted. Further, if you are a Visitor, you expressly consent to the deployment of cookies, pixels, and similar third-party tracking technologies for the purposes described herein. You may indicate your agreement to this Privacy Policy by continuing to use the Site, by checking a box to affirm your consent to the applicable terms of service or agreement and this Privacy Policy, or by creating an account on our Services. If you do not agree to this Privacy Policy, you should cease to access or use the Services immediately.

If you are a resident of Washington State, you may have additional rights regarding your personal information. For more information, see the section titled “Washington Residents – Rights Regarding Your Consumer Health Data” below.

Longer provisions include summary notes titled “More simply”. These summaries are provided as a courtesy to help you understand this Privacy Policy; however, they are not legally binding and do not modify the legal effects of this Privacy Policy in any way.

1. End Users Subject to Employer Terms

More simply: The provisions of this Privacy Policy that may apply to you, depend on whether you use our Site, our benefits platform, or both. If you are an End User of our benefits platform or other employee benefits-related offerings, we are processing your personal information on behalf of your employer and you should contact your employer with questions regarding the processing of your personal information.

If you are an End User, this Privacy Policy does not modify any agreements or other binding terms between you and your employer with respect to your personal information. Your employer is responsible for providing you with all notices regarding, and obtaining your consent to, the processing of your personal information through the Services. Some employers may require or choose to add additional or different limitations or restrictions on data practices related to their employees' use of our Services (i.e., your employer may add additional privacy restrictions or limitations above and beyond what is described in this policy).

End Users who wish to exercise their rights regarding personal information that we have processed on behalf of their employer should submit inquiries to their employer directly. We will refer any such requests from End Users to their employer pursuant to the requirements of applicable data protection laws.

2. Definition of “personal information”

Information that we process about you in connection with the Services falls into two categories:

(1) "personal information", which means information that identifies, relates to, describes, or could reasonably be linked, directly or indirectly, with an identified or identifiable individual. The term “personal information” can include information such as your name, address, telephone number, and e-mail address, but can also include indirect identifiers such as your IP address or device identifier.

(2) “non-personal information”, which means data that is collected in relation to your use of the Services, but which cannot be used to identify you, or otherwise linked back to you. Such non-personal information is not subject to the terms of this Privacy Policy.

Personal and non-personal information are both referenced throughout this Privacy Policy as “your information” or “information about you”.

If you are an End User, please note that your employer may request that we process certain health-related personal information from you in connection with our provision of Services. As of the “Last Updated” date of this policy, Avante does not constitute a “covered entity” subject to the Health Insurance Portability and Accountability Act (“HIPAA”); we only process information that is subject to the HIPAA in our capacity as a “business associate” to a covered entity. As such, unless expressly stated, health-related and lifestyle-related personal information that End Users submit directly to our Services (rather than through an employer) is not “Protected Health Information” or “PHI” (as defined under HIPAA).

3. Information We Process

We may collect a variety of information from or about you or your devices, from various different sources, as described below.

a. Information you submit in connection with your use of our Site:

More simply: We process information that you submit to us in connection with your use of our Site—for example, when you sign up to receive updates through our website, register for an account for our platform, or correspond with us by e-mail.

- **Subscription To Receive Notices.** Avante may offer the ability to subscribe to the Services and to receive updates about the Services via e-mail. To subscribe, you may be required to provide us with personal information such as your name and e-mail address.
- **Communications with Avante.** When you send e-mail messages to Avante, we may receive information about you, and may use the information to respond to your communication and for other purposes described in this Privacy Policy. We may also archive this information and/or use it for future communications with you where we are permitted by law to do so.

You are responsible for verifying the accuracy of the personal information you submit (or that is submitted on your behalf) to the Services and ensuring that any personal information that you provide is kept up to date for the purposes for which you provide it.

b. Information you submit in connection with your use of our benefits platform:

More simply: We process information that you submit to us in connection with your use of our benefits platform and other benefits-related offerings—for example, if you use our AI assistant, we may process information relating to your employee benefits, including personal information regarding your physical or mental health, employment, and finances.

- **Use of the Platform.** Our Services include a web-based service platform, AI assistant, and other Integrated Products which allow employees to obtain answers to questions about, and obtain personalized insights into, their employee benefits. The scope of the personal information submitted to the Services for processing will vary depending on your use of the platform, but may include the categories below:
 - Name, date of birth, and information of plan dependents;
 - Demographic information such as your city, state, and country of residence;
 - Employment information, including compensation, the identity of your employer, work history, the health plans that your employer offers to you, and the cost of each of those health plans to you;
 - Medical insurance-related information such as medical insurance usage information, and annual medical expenses and costs;
 - Health and lifestyle information, such as medical conditions and activities—for example, history of medical benefits and plans, use

of medical services and practices, past, present or future medical conditions, medical diagnosis, and other health information or other related medical history.

- **Account Registration.** You will be required to provide your personal information to sign up for an account on our platform, and to use or access certain tools and features of the platform. To register for an account, you will be required to provide us with personal information such as your contact information, including your full name and e-mail address.
- **Communications.** If you contact us directly in connection with your use of our web-based service platform or AI assistant, we may receive additional information about you, such as your name, email address, health plan, the contents of a message or attachments that you may send to us, and other information you choose to provide.

c. Information that is automatically collected when you use our Services:

More simply: When you access or use our Services, including our Site, we collect certain information about you automatically, such as your browser type and the pages you visit. Please note that we may collect such information using cookies and similar technologies. We process such information so that we can recognize you when you return to our Services and personalize and improve your experience.

- **Device Information.** We receive information about the device and software you use to access our Services, including IP address (from which we collect your general location information), web browser type, operating system version, and device identifiers.
- **Usage Information.** To help us understand how you use our Services and to help us improve them, we automatically receive information about your interactions with our Services, such as the pages that you visited, the order in which those pages were visited, when they were visited, and which hyperlinks were "clicked" on our Services.
- **Cookie-Based Information.** We, our service providers, and our business partners, may deploy and use cookies, web beacons, frames, server log analyses, and similar technologies on the Site for various purposes, such as to remember your login information, to collect statistical information, to verify information, to customize your experience with our Site, and for our marketing purposes. Depending on the devices and technologies that you use, you may be able to control the deployment of some cookies at the browser-level. Some browsers have incorporated "Do Not Track" (DNT) features that can send a signal to the websites you visit indicating you do not wish to be tracked. As of the date on which this Privacy Policy was last updated, our Site does not currently respond to browser DNT signals. If you do not wish to be tracked, you may be able to opt out by selecting certain options in the settings of the browser or device that you use to access the Site, or by using third-party applications and

programs. Note, however, that modifying or disabling our deployed cookies may cause the Site to malfunction, or may cause features of the Site to become unavailable to you entirely.

d. Information We Receive from Other Sources:

More simply: If you are an End User, we may obtain and process information about you from or on behalf of your employer and other publicly available resources in connection with your use of our Services.

- **Information from Employer and Service Providers Offering Benefits Solutions.** Your employer (and service providers offering benefits solutions to you or your employer) may provide personal information about you in connection with your use of our platform. Such information may include your health insurance plan election(s), your single sign-on login information, information about your health plan and how you use it, your health insurance claims information, demographics information, date of birth, zip code, and employment-related information such as your title and office location) and other information about you to enable us to confirm your eligibility (or the eligibility of your dependents or household member(s), as applicable), to contact you regarding the availability of benefits, and to allow you to access and use the Services. Please contact your employer for further information about the personal information that we process under this section.
- **Information from ServiceNow.** In cases where the Services are provided to you as an application or integration through the ServiceNow platform, note that when you submit information to us regarding a potential technical error, issue, or incident via ServiceNow, we may process the following categories of personal information outside of ServiceNow:
 - (i) Name;
 - (ii) E-mail address;
 - (iii) Incident ticket, report, or similar ID;
 - (iv) Contents of the incident ticket, report, or other submission, message, or correspondence arising from the incident.

Personal information listed above is transferred from ServiceNow to us through the ServiceNow Incident & NowAssist products, and will be used, stored, and secured as described in this Privacy Policy. We process this personal information for purposes of providing troubleshooting, Q&A, and similar or related support in connection with your use of the Services.

- **Information from other third parties.** If you are an End User, we may use publicly available information about you and combine it with other information we have about you, to provide information and personalized insights to you or otherwise personalize your experience on our Services. Where permitted by law, we may also combine any of the information that we collect from you with other

information to improve analytics and functionality, and for other business and commercial purposes relating to the Services.

4. How We Use Your Information

More simply: We process information about you to create your account, to provide technical support, to communicate with you, to facilitate your use and our administration and operation of the Services, to learn more about and improve the Services, and for other purposes permitted by law.

We process information about you in accordance with applicable laws, including to provide, maintain, improve, and enhance our Services; to understand and analyze how you use our Services and develop new products, services, features, and functionality, to communicate with you, to find and prevent fraud and abuse, and respond to trust and safety issues that may arise, and for other purposes for which we provide specific notice at the time the information is collected. Examples of our uses include:

1. Enabling End Users to set up user accounts and profile on our platform;
2. Contacting service providers offering benefits solutions at the request or on behalf of End Users;
3. Sending emails to End Users relating to their account and/or use of the Services. Including responses to e-mails that were sent to us, or notices of updates or changes to our policies and procedures;
4. Developing, maintaining, or improving our Services by:
 - a. Analyzing use of the Services to understand user interest and engagement on the Services;
 - b. Researching and developing our Services;
 - c. Detecting security incidents, or protecting against malicious, deceptive, fraudulent, or illegal activity; and
 - d. Debugging to identify and repair errors.
5. To generate guides and resources for your employer regarding employee benefits, and provide other Services relating to benefits utilization analytics.

We may also process your information to enforce our Terms of Service or other legal rights, or as may be required by applicable laws and regulations or requested by any judicial process or governmental agency.

Further, we process information about you to create and use anonymous, statistical or aggregated data. Such aggregated data does not allow any party to identify you or any other specific user, and is not personal information subject to this Privacy Policy. We use such aggregated data to maintain and operate the Services, to improve the quality of the Services, to create new services and features, and for further internal, commercial and statistical purposes.

5. How We Disclose the Information We Collect

More simply: We may share anonymized and aggregated information with our third-party service providers, your employer, and business partners as needed to provide our Services and for the other purposes described in this policy. Such third parties are required to maintain the security and confidentiality of your personal information. We will not share your personal information with any other third parties, except as required by law or with your consent.

Avante allows third parties such as service providers (e.g., internet and cloud hosting services providers, such as Amazon Web Services) to process your personal information to enable us to provide the Services and for the other purposes specified in this Privacy Policy. Third parties to whom we disclose your personal information are listed below:

- **Our Vendors and Service Providers.** We may disclose personal information to third-party service providers in connection with enabling us to provide the Services to you, as permitted by this Privacy Policy, and as may be otherwise required or permitted by applicable law.
- **Your Employer.** If you are an End User, we may disclose information about your use of the Services to your employer in connection with providing the Services to you and as may be otherwise required or permitted by applicable law. We may also process and share aggregated metrics regarding personnel use of the Services with your employer. For example, we may share de-identified versions of questions asked by End Users and aggregated metrics regarding the percentage of End Users who asked about Health Savings Accounts with your employer. Note that all such information shared with your employer is pseudonymized, aggregated, de-identified, or anonymized, such that it is no longer personal information, before it is disclosed. Additionally, we will not share personal information that you submit to us directly (as listed in Section 3(b), titled “Information you submit in connection with your use of our benefits platform”), except with your consent, or as necessary to comply with applicable law.
- **Your Benefits Service Providers.** If you are an End User who requests that we provide Services relating to generating personalized insights based on your specific employee benefits, we may disclose personal information to third-party service providers that provide services to you in connection with your employee benefits (“**Benefits Service Providers**”) in connection with enabling us to provide the Services to you, to engage in the use and disclosure of personal information as permitted by this Privacy Policy, and as may be otherwise required or permitted by applicable law. We will not disclose personal information provided by your Benefits Service Providers regarding your employee benefits, to any other third parties except for the purposes and processing activities described in this Privacy Policy.

- **Third Parties Involved in Avante’s Merger, Sale, or Other Asset Transfers.** We may also disclose your personal information to service providers, advisors, potential transactional partners, or other third parties in connection with the consideration, negotiation, or completion of a corporate transaction in the event that Avante is acquired through a sale, merger, or otherwise experiences a change in corporate control; and. We reserve the right to disclose or transfer any information we have about you as part of, or during negotiations of, any merger, sale of company assets, or acquisition, or in any other situation where personal information may be transferred with other assets of Avante.
- **Third Parties That You Have Authorized.** We may also disclose your information when you request that we do so or otherwise give your consent—for example, if you authorize the linking of your account on our Services to your accounts on third-party platforms, we may share your personal information with those third-party platforms as necessary to link your accounts.
- **For Legal Compliance Purposes.** We may also disclose your personal information to other third parties when and as required by law or if we otherwise believe it appropriate and/or necessary: (a) to comply with any decrees, laws and/or statutes or in an effort to comply with any legal process served upon us or upon the Services; (b) to maintain, safeguard and/or preserve our rights or property; (c) to protect the personal safety of our users and/or the public; or (d) to enforce our rights and agreements, and otherwise in connection with our Terms of Service and other agreements.

6. Retention of Personal Information

More simply: We’ll retain your information as long as it’s necessary to serve you or comply with legal obligations, and may hold it for the maximum period permitted by applicable law.

We will retain personal information for as long as it is needed for or otherwise serves the purposes outlined in this Privacy Policy, in accordance with our policies and practices, applicable law, and contractual obligations. We may need to retain your information for a longer period where we need the information to comply with regulatory or legal requirements (e.g. HIPAA) or where we may need it for our legitimate purposes e.g. to help us respond to queries or complaints, to respond to requests from regulators, etc. Additionally, there may be occasions where we are unable to fully delete, anonymize, or de-identify your personal information due to technical, legal, regulatory compliance or other operational reasons. Where this is the case, we will take reasonable measures to securely isolate such information from any further processing until such time as we are able to delete, anonymize, or de-identify it.

7. Washington Residents – Rights Regarding Your Consumer Health Data

More simply: If you are an End User residing in Washington State, you may have certain rights to know about how your “consumer health data” is processed, and to access that data. Please read the section below for more information.

For purposes of the Washington State My Health My Data Act, this Privacy Policy constitutes a “consumer health data privacy policy”. The information below is provided to fulfill those requirements.

a. Information Regarding Your Consumer Health Data

As of the “Last Updated” date of this Privacy Policy, Avante processes personal information that identifies the past, present, or future physical or mental health status of a consumer only in order to provide Services in the form of personalized insights regarding the consumer’s health and lifestyle benefits, information relating to employee benefits, and related Services requested by the consumer. As such, Avante may process personal information in the following categories:

- Individual health conditions, treatment, diseases, or diagnosis;
- Social, psychological, behavioral, and medical interventions;
- Health-related surgeries or procedures;
- Use or purchase of prescribed medication;
- Bodily functions, vital signs, symptoms, or measurements;
- Diagnoses or diagnostic testing, treatment, or medication;
- Gender-affirming care information;
- Reproductive or sexual health information;
- Biometric data;
- Genetic data;
- Data that identifies a consumer seeking health care services; and
- Information derived or extrapolated from nonhealth information that is associated with the categories of data listed above, or otherwise identifies the consumer associated with categories of data listed above.

b. Rights Regarding Your Consumer Health Data

Under Washington’s My Health My Data Act, residents of Washington State have the right (i) to confirm the specific categories of consumer health data about you that we are processing, and to access such data; (ii) to receive a list of all third parties and affiliates with whom we have shared or sold your consumer health data and an active email address or other online mechanism that you may use to contact these third parties; (iii) to withdraw consent from our collection and sharing of your consumer health data; and (iv) to have your consumer health data deleted upon request. Consumers may exercise any of these rights up to twice per year.

c. How to Exercise Your Rights

To exercise these rights, you may submit a verifiable consumer request to us by using the contact information provided at the bottom of this page. Only you, or a person that you authorize to act on your behalf, may make a verifiable consumer request related to your personal information. Your verifiable consumer request must provide sufficient information that allows us to reasonably verify that you are the person about whom we collected personal information or an authorized representative, and describe your request with sufficient detail that allows us to properly understand, evaluate, and respond to it. We cannot respond to your request or provide you with information if we cannot verify your identity or authority to make the request. Making a verifiable consumer request does not require you to create an account with us. We will only use personal information provided in a verifiable consumer request to verify the requestor's identity or authority to make the request.

We endeavor to respond to a verifiable consumer request within forty-five (45) days of its receipt. If we require more time (up to ninety (90) days from the day that we received your request), we will inform you of the reason and extension period in writing.

d. Exceptions

The above rights are not absolute, and in some instances, we may decline your request as permitted by law. If your request to exercise a right is denied, you may appeal that decision by contacting us at privacy@avante.ai. If your appeal is unsuccessful, you can raise a concern or lodge a complaint with the Washington State Attorney General at www.atg.wa.gov/file-complaint.

Note that some personal information is necessary to use our Services. As such, even if you remove all of your personal information from your account, we may retain some of your personal information to comply with our legal obligations or as necessary to provide the Services to you.

8. Third Parties

More simply: This Privacy Policy does not apply to your activities on third-party services or platforms, or any information you disclose to third parties.

Our Services may contain links to other websites, products, or services that we do not own or operate. Please be aware that this Privacy Policy does not apply to your activities on these third-party services or any information you disclose to these third parties. We encourage you to read their privacy policies before providing any information to them.

9. Security

More simply: You are responsible for accessing and using our Services in a secure manner. Avante does not guarantee the security of information submitted to us, and is not responsible for your failure to keep your personal information secure.

Avante uses commercially reasonable security measures to protect the information that we collect about you. Nevertheless, you are responsible for securing the account that you use to access our Services. Your obligations may include, as applicable, monitoring your account activities, choosing a secure password, and maintaining the confidentiality of your password. We cannot guarantee the security of any personal information that you submit to our Services, nor can we guarantee that unauthorized access, hacking, data loss, or other breaches will never occur. If you elect to provide personal information to us, you should be aware that you provide it at your own risk. Avante cannot be held responsible for your failure to keep your account information secure.

10. Children's Privacy

More simply: We do not intentionally collect personal information from persons under 13 years of age except in the course of providing Services to a parent or guardian. Please contact us if you believe we may have received personal information regarding someone under 13 years of age.

We do not knowingly collect personal information from children under 13 years of age, and no part of our Services are directed to children. If you learn that a child has provided us with personal information in violation of this Privacy Policy, you may alert us at privacy@avante.ai.

11. International Visitors

More simply: Currently, Avante is not subject to the data privacy laws of the EU, the UK, or U.S. state-level data privacy laws. By using our Services, you consent to the transferal and processing of your personal information in the United States and other jurisdictions with levels of data protection which may differ from those applicable in your jurisdiction.

As of the "Last Updated" date above, Avante is not subject to the General Data Protection Regulation of the European Union or the United Kingdom, nor to the state-level data privacy laws of Colorado, California, Connecticut, Montana, Nebraska, Oregon, Texas, Utah, or Virginia). Note, however, that Avante processes personal data of individual End Users in connection with their employer's subscriptions to the Services. In such cases, Avante may constitute a "service provider" or a "data processor" to the corresponding employer, and processes personal data only to the extent permitted and directed by the corresponding employer. Additionally, if you are located outside of the United States, note that all information processed by Avante may be transferred, processed, and stored anywhere in the world, including, but not limited to, the United States or other countries, which may have data protection laws that are different from the laws where you live. By providing any information, including personal information, on or to the Services, you consent to such transfer, storage, and processing.

If you are an End User, please contact your employer for more information about Avante's processing of your personal information.

12. Artificial Intelligence Training Data Transparency

More simply: Avante's AI technologies do not process personal information for purposes of automated decisionmaking or profiling unless we have received your consent. You may not use the Services for such purposes (or any other purposes prohibited by law) without Avante's express written consent.

Our Services are based on the APIs offered by Google, LLC (<http://gemini.google.com/>) Microsoft Corporation (<https://azure.microsoft.com/en-us/products/ai-foundry/models>), Anthropic, Inc (<https://anthropic.com/>) and OpenAI, LLC (<https://openai.com/>). Our Services are based on pre-trained APIs, and are not further trained on any datasets outside of those provided by the entities listed above (collectively, "**Third-Party Datasets**"). Such Third-Party Datasets may include aggregate consumer information, as defined in subdivision (b) of Section 1798.140 of the California Civil Code; however, they do not include personal information. We license the Third-Party Datasets from their respective owners to provide the Services on the terms described in this Privacy Policy. Except as expressly granted in an agreement executed by Avante and by you, all rights with respect to those Third-Party Datasets (including copyright, trademark, or patent) are reserved by their respective owners. Avante does not clean, modify, process, or otherwise have access to the Third-Party Datasets except to the extent incorporated into the artificial intelligence services provided by the foregoing third parties.

The Services will not process your personal information for purposes of profiling or making decisions based solely on automated processing without your prior consent. For the avoidance of doubt, you may not use the Services in any manner that would cause the Services to directly make, or be a substantial factor in directly making, any decisions relating to providing or denying services to consumers with respect to employment, healthcare, or insurance, or any opportunities relating thereto.

13. Changes to this Privacy Policy

More simply: We may update this Privacy Policy from time to time. You should review this policy from time to time to ensure that you understand and are up-to-date on its terms. Continued use of our Services following the effective date of any changes to this Privacy Policy will be taken as your agreement to those changes.

We reserve the right to update this Privacy Policy at any time and at our sole discretion, in accordance with applicable laws and the terms of service agreement between Avante and you. We will post any adjustments to the Privacy Policy on this page, and the revised version will be effective when it is posted. If we materially change the ways in which we use or disclose personal information previously collected from you through the Services, we will notify you through the Services, by email, or other communication as we deem appropriate. We may, and if required by law, will also provide notification of

changes in another way that we believe is reasonably likely to reach you, such as via e-mail (if you have an account where we have your contact information) or another manner through the Services. In all cases, your continued use of the Services after the posting of any modifications to this Privacy Policy indicates your acceptance of those modified terms.

14. Contact Information

If you have any questions, concerns, or complaints regarding our Privacy Policy or data processing activities, please contact us using the information provided below:

Avante Health, Inc.

The Bullitt Center

1501 East Madison Street, Suite 150

Seattle, WA 98122

privacy@avante.ai

We will respond to your complaint, inquiry, or information request as we have the capacity to do so.