



AMERICAN ESTATE INSTITUTE

Preserving Legacy. Recovering Rightful Assets.

Privacy Policy

Last Updated: April 12, 2026

Introduction

Your privacy is important to American Estate Institute LLC (“AEI,” “we,” “us,” or “our”). This Privacy Policy explains how AEI collects, uses, discloses, and retains personal information in connection with our business activities, including through our website at www.americanestateinstitute.com, our asset-location and heir-recovery services, marketing activities, and other communications.

We refer to all of these activities collectively as the “Service.”

1. Application

This Privacy Policy applies if you are a client who uses our services, a user who visits our website, a job applicant, or an individual who otherwise interacts with us.

In some cases, at the time of collection of your personal information, we may provide you with additional information regarding how that information will be processed.

2. Your Consent

By providing AEI with personal information, you consent to the collection, use, disclosure, and retention of that information by AEI in accordance with this Privacy Policy and as otherwise permitted by applicable law.

You may withdraw your consent at any time, subject to legal or contractual restrictions and upon reasonable notice to AEI. However, withdrawal of consent may affect your ability to proceed with your intended interactions or transactions with AEI or to receive the full benefit of our services. See the “Your Right to Withdraw Consent” section below for details.

3. Personal Information We Collect

(a) Information You Provide

You may be asked to voluntarily provide personal information when you interact with AEI. This may include:

- Contact information (name, address, phone number, email)
- Government-issued identification (driver's license, passport) when verifying your identity as an heir
- Relationship documentation (birth certificates, marriage records) to establish heirship
- Financial information necessary to process estate distributions or cash advances
- Communications preferences and correspondence between us
- Employment information when applying for a position with AEI

You may choose not to provide certain requested personal information, but doing so may limit our ability to provide services to you.

If you provide AEI with the personal information of another individual (for example, a family member in connection with an estate case), you confirm that you have the right or valid consent to do so in compliance with applicable laws.

(b) Information Collected Automatically

AEI may use technologies to automatically collect certain information when you visit our website, including dates and times of access, browser type, operating system, device information, IP address, and details of your use of the website.

Our website may use cookies, web beacons, pixels, or similar technologies to improve our services, communications, and advertising, and to prevent fraud. Some automatically collected information is non-personal and will be treated as such unless applicable law requires otherwise.

(c) Information from Other Sources

AEI may collect personal information from publicly available sources (including probate court records, vital records, and genealogical databases) and from third-party service providers in connection with our heir-research and asset-location activities.

4. How We Use Personal Information

AEI may use personal information for purposes including:

- To provide heir-recovery and asset-location services, including identifying, locating, and verifying heirs and processing estate claims
- To contact and correspond with you regarding your case, transactions, or use of our website
- To process and respond to inquiries, requests, and communications
- To verify your identity and relationship to a deceased individual in connection with an estate claim
- To process cash advance disbursements and estate distributions
- To provide you with information regarding AEI and our services
- To maintain, protect, and improve our website and services
- To develop and improve our advertising and marketing
- To protect and enforce AEI's legal rights and interests

AEI may transfer your personal information to service providers who assist us in providing services (for example, document retrieval, genealogical research, payment processing, analytics, email delivery, and data hosting).

AEI will not sell your personal information.

5. How We Disclose Personal Information

(a) With Your Consent

AEI may disclose your personal information in accordance with express or implied consents that you provide during your interactions with us.

(b) Service Providers and Partners

AEI may share your personal information with service providers and partners who assist in the delivery of our services, including private investigators, attorneys, court filing services, and document retrieval providers. AEI will only disclose your information to these parties as necessary to provide services to you.

(c) Legal and Law Enforcement

AEI may disclose your personal information as required or authorized by applicable law, including to comply with a subpoena, warrant, court order, or litigation obligation. AEI may also disclose personal information to law enforcement agencies or other parties if we reasonably believe the disclosure is necessary to protect AEI's legal rights, to detect and prevent fraud, or to address issues of public importance.

(d) Business Transactions

AEI may disclose your personal information in connection with a proposed or actual business transaction involving AEI (such as a merger, acquisition, or sale of assets), provided that the recipient agrees to protect your personal information in a manner consistent with this Privacy Policy.

6. Your Right to Withdraw Consent

You may withdraw your consent to AEI's collection, use, disclosure, and retention of your personal information at any time, subject to legal or contractual restrictions and upon reasonable notice. To withdraw your consent, contact us using the information provided at the end of this Privacy Policy.

If you withdraw consent for purposes integral to the provision of our services, you may not be able to proceed with your case or receive the full benefit of AEI's services.

If you withdraw consent for non-essential purposes (such as marketing communications), this will not affect the provision of our core services to you.

7. California Privacy Rights

If you are a California resident, you may have additional rights under the California Consumer Privacy Act (CCPA), including:

- The right to know what personal information AEI has collected about you
- The right to request deletion of your personal information
- The right to opt out of the sale of your personal information (AEI does not sell personal information)
- The right not to be discriminated against for exercising your privacy rights

To exercise any of these rights, contact us using the information at the end of this Privacy Policy. We will respond to verifiable requests within 45 days as required by law.

8. Retention of Personal Information

AEI retains personal information for the period reasonably necessary for the purposes described in this Privacy Policy, to comply with legal obligations, or to protect AEI's legal rights. For estate case files, AEI retains records for a minimum of seven (7) years following case closure.

AEI will delete, dispose of, or anonymize your personal information when it is no longer reasonably required for the purposes set out in this Privacy Policy.

9. Protection of Personal Information

AEI uses reasonable administrative, physical, and technical safeguards appropriate to the sensitivity of the personal information in our possession to help protect against unauthorized access, collection, use, disclosure, or deletion. These measures include:

- Internal policies limiting employee access to personal information on a need-to-know basis
- Technical safeguards such as encryption, firewalls, passwords, and antivirus software
- Secure cloud storage with access controls and two-factor authentication
- Employee privacy and data security training
- A written data retention and destruction policy

While AEI takes reasonable precautions, no security system is completely secure. AEI cannot guarantee that your personal information will not be accessed or disclosed in ways not described in this Privacy Policy.

10. Accuracy and Access to Personal Information

AEI relies on you to ensure that the personal information you provide is accurate, complete, and up to date. Please notify us promptly of any changes using the contact information below.

You may request access to your personal information collected by AEI and information about how it is used, disclosed, and retained by submitting a written request to us. Subject to applicable exceptions, you will be given reasonable access to your information and may request corrections as appropriate.

11. Children and Personal Information

AEI does not knowingly collect personal information from children under 14 years of age without the consent of a legal guardian. If we learn that we have collected personal information from a child without required consent, we will delete that information. If you believe AEI may have information from or about a child, please contact us.

12. Third-Party Websites and Services

The AEI website and communications may include links to websites operated by independent businesses or third parties. AEI has no responsibility or liability for those third parties, their websites, or their privacy practices. This Privacy Policy does not apply to the collection, use, or disclosure of your personal information by third parties.

13. Social Media

When you use aspects of the AEI website or services to post or share information on social media, that information is visible to other persons and may be collected, used, or disclosed by others. AEI has no control over or responsibility for information you choose to share on social media platforms. Those platforms are governed by their own privacy policies.

14. Changes to This Privacy Policy

AEI may update this Privacy Policy from time to time by posting a revised version on our website. Your continued use of AEI's website or services after any changes constitutes your acceptance of the updated Privacy Policy. We encourage you to review this page periodically. The "Last Updated" date at the top of this policy indicates when it was most recently revised.

15. Contact Us

If you have any questions, comments, or concerns about this Privacy Policy or how AEI handles your personal information, please contact us:

American Estate Institute LLC

Address: 204 2nd Ave, #505

City, State ZIP: San Mateo, CA 94401

Email: support@americanestateinstitute.com

Website: www.americanestateinstitute.com
