



## Customer Privacy Policy Notice

In November of 1999, Congress enacted the Gramm-Leach-Bliley Act (GLBA). The GLBA requires certain financial institutions, such as investment advisor firms, to protect the privacy of customer information. In situations where a financial institution does disclose customer information to non-affiliated third parties, other than permitted or required by law, customers must be given the opportunity to opt out or prevent such disclosure. Wilson Wealth Stewardship does not share or disclose customer information to non-affiliated third parties except as permitted or required by law.

Wilson Wealth Stewardship is committed to safeguarding the confidential information of its clients. Wilson Wealth Stewardship holds all personal information provided by clients in the strictest confidence and it is the objective of Wilson Wealth Stewardship to protect the privacy of all clients. Except as permitted or required by law, Wilson Wealth Stewardship does not share confidential information about clients with non-affiliated parties. In the event that there were to be a change in this policy, Wilson Wealth Stewardship will provide clients with written notice and clients will be provided an opportunity to direct Wilson Wealth Stewardship as to whether such disclosure is permissible.

To conduct regular business, Wilson Wealth Stewardship may collect personal information from sources such as:

- Information reported by the client on applications or other forms the client provides to Wilson Wealth Stewardship
- Information about the client's transactions implemented by Wilson Wealth Stewardship or others
- Information developed as part of financial plans, analyses or investment advisory services

To administer, manage, service and provide related services for client accounts, it is necessary for Wilson Wealth Stewardship to provide access to customer information within the firm and to non-affiliated companies with whom Wilson Wealth Stewardship has entered into agreements. To provide the utmost service, Wilson Wealth Stewardship may disclose the information below regarding customers and former customers, as necessary, to companies to perform certain services on Wilson Wealth Stewardship's behalf.

- Information Wilson Wealth Stewardship receives from the client on applications (name, Social Security number, address, assets, etc.)
- Information about the client's transactions with Wilson Wealth Stewardship or others (account information, payment history, parties to transactions, etc.)
- Information concerning investment advisory account transactions
- Information about a client's financial products and services transaction with Wilson Wealth Stewardship

Wilson Wealth Stewardship may use SMS texting for communication purposes. Mobile opt-in information will not be shared with third parties/affiliates for marketing/promotional purposes. All the above categories exclude text messaging originator opt-in data and consent; this information will not be shared with any third parties. If you wish to be removed from receiving future communications, you can opt out by texting STOP, OPT OUT, or UNSUBSCRIBE.

Since Wilson Wealth Stewardship shares non-public information solely to service client accounts, Wilson Wealth Stewardship does not disclose any non-public personal information about Wilson Wealth Stewardship's customers or former customers to anyone, except as permitted by law. However, Wilson Wealth Stewardship may also provide customer information outside of the firm as required by law, such as to government entities,

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consumer reporting agencies or other third parties in response to subpoenas. In the event that Wilson Wealth Stewardship has a change to its customer privacy policy that would allow it to disclose non-public information not covered under applicable law, Wilson Wealth Stewardship will allow its clients the opportunity to opt out of such disclosure.