# Privacy Policy

Experience Your Wealth, LLC recognizes that our relationships with current and prospective clients are based on integrity and trust. We work hard to maintain your privacy and to preserve the private nature of our relationship with you. We are committed to securing the confidentiality and integrity of your personal information. Experience Your Wealth, LLC will not disclose your personal information to anyone unless it is required by law or at your direction. We will not sell your personal information. Experience Your Wealth, LLC will provide this privacy statement to all clients annually.

We are proud of our privacy practices and want our current and prospective clients to understand why, what, and how information is collected; how we use it; and how we protect your personal information.

### Why We Collect Your Information

We gather information about you so that we can:

- Know who you are and thereby prevent authorized access to your information;
- Design, implement, and improve the services we provide you; and
- Comply with the laws and regulations that govern us.

In providing financial services to you, we collect certain non-public personal information about you. Our policy is to keep this information strictly safeguarded and to use or disclose it only as needed to provide services to you, or as permitted by law. Protecting your privacy is important to us.

### What Information We Collect and Maintain

We may collect the following types of “nonpublic personal information” about you:

- Information about your identity, such as your name, address, social security number, date of birth, and financial information
- Information that we generate to service your financial needs (e.g., transaction data)
- Information that we may receive from third parties with respect to your financial profile

### How We Obtain Your Information

We collect nonpublic personal information about clients such as you from the following sources:

- From you during our initial meeting or subsequent consultations
- From you via applications or other forms you complete
- From your transactions with us or others as related to services we provide to you
- From your other advisors, when authorized by you to share that information

### What Information We Disclose

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as permitted by law. Moreover, we will not release information about our clients or former clients unless at least one of the following conditions is met:

- We receive your prior written consent
    - Clients may provide this consent by signing the **Information Sharing Authorization Form** or initialing in the appropriate field in the **Client Agreement.**
- We believe the recipient to be you or your authorized representative.
- We are required by law to release information to the recipient.

We use information about you and your account only to help us better serve your financial needs or to suggest services or educational materials that may be of interest to you. Arrangements with companies or independent contractors not affiliated with Experience Your Wealth, LLC will be subject to confidentiality agreements.

### Exceptions

We may be required to disclose client confidential information in the following circumstances:

- To resolve client disputes or inquiries;
- To persons holding a legal or beneficial interest relating to the client;
- To provide information to agencies assessing our compliance with industry standards;
- To respond to a regulator's examination of Experience Your Wealth, LLC or
- To comply with civil, criminal, or regulatory investigations by federal, state, or local authorities.

### How We Safeguard Your Personal Information

Privacy has always been important to Experience Your Wealth, LLC. We maintain physical, electronic, and procedural safeguards that are reasonably designed to protect the security and confidentiality of your personal account information. These include confidentiality agreements with individuals and companies we may hire to help us provide services to you, password-protected user access to our computer files, locked filing cabinets for paper files, and strict confidentiality policies that apply to all Experience Your Wealth, LLC personnel.

We also restrict access to your personal and financial data to authorized Experience Your Wealth associates who have a need for this information. We educate associates about safeguarding client information and preventing its unauthorized access, disclosure, or use and will require them to acknowledge in writing their acceptance and understanding of our privacy policy.

We require nonaffiliated organizations to conform to our privacy standards and ensure they are obligated contractually to keep confidential the information provided and to use such information only as requested.

Furthermore, we will continue to adhere to the privacy policies and practices described in this notice even after your account is closed or becomes inactive. We will continue to conduct our business in a manner that conforms with our pledge to you, your expectations, and all applicable laws.