



PERSPECTIVE

Wealth Partners

WHAT PERSPECTIVE WEALTH PARTNERS DOES WITH YOUR PERSONAL INFORMATION

Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Date of Birth
- Address
- Phone numbers
- Social Security number
- financial information
- Investment holdings, investment experience and account transactions
- Financial goals and financial history

When you are no longer our customer, we continue to share your information as described in this notice. All financial companies need to share clients' personal information to run their everyday business. In the section below we list the reasons financial companies can share their clients' personal information, the reasons Perspective Wealth Partners chooses to share, and whether you can limit this sharing.

Reasons we can share your personal information	Does Perspective Wealth Partners share?	Can you limit this sharing?
For our everyday business purposes — such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes — to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	We don't share
For our affiliates' everyday business purposes — Information about your transactions, experiences, and creditworthiness	No	We don't share
For nonaffiliates to market to you	No	We don't share

Who we are

Who is providing this notice?

Perspective Wealth Partners

What we do

How does Perspective Wealth Partners protect my personal information?

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards, in addition to secured files and buildings. We also restrict access to your personal information to those individuals who need to know the information to provide services and/or products to you.

How does Perspective Wealth Partners collect my personal information?

We collect your personal information when you:

- Open an account or deposit funds
- Receive financial planning services
- Seek advice about investments

Why can't I limit all sharing?

Federal law gives you the right to limit:

- Sharing for affiliates' everyday business purposes — information about your creditworthiness
- Affiliates from using your information to market to you
- Sharing for nonaffiliates to market to you

State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- We have no affiliates

Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- Our nonaffiliated business partners include our custodian, Charles Schwab, Redtail Technology, and Orion Portfolio Management

Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- We do not have any such agreements in place

Other important information

Consumers may opt in to SMS Communication verbally or by phone. Consumers may then opt-out at any time and are presented with opt-out instructions upon initial SMS Communication.

You may have additional privacy protections under applicable state laws. To the extent additional state laws apply, we will comply with those laws when we share information about you and in some cases may be limited by you.

Questions? Contact Perspective Wealth Partners | 208-429-0960