

E-Wealth Partners, LLC

Privacy Policy

Effective Date: July 14, 2023

FACTS

WHAT DOES E-Wealth Partners DO WITH YOUR PERSONAL INFORMATION?

Why?

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.

What?

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

- Social Security number and income
- account balances and transaction history
- investment experience and account transactions

When you are *no longer* our customer, we continue to share your information as described in this notice.

How?

All financial companies need to share customer's personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customer's personal information; the reasons E-Wealth Partners chooses to share; and whether you can limit this sharing.

REASONS WE CAN SHARE YOUR PERSONAL INFORMATION

DOES E-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 and experiences

No

We don't
share

For our affiliates' everyday business purposes—
information about your creditworthiness

No

We don't
share

For nonaffiliates to market to you

No

We don't
share

Questions?

Call (952) 800-2121

WHO WE ARE

Who is providing this notice?

E-Wealth Partners

WHAT WE DO

How does E-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 and secured files and buildings.

How does E-Wealth Partners collect my personal information?

We collect your personal information, for example, when you

- open an account or give us your income information
- tell us about your portfolio or deposit money
- enter into an investment advisory contract

We also collect your personal information from others, including affiliates and other companies.

Why can't I limit all sharing?

Federal law gives you the right to limit only

- 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.

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.

- *E-Wealth Partners does not share with nonaffiliates so they can market to you.*

Joint marketing

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

- *E-Wealth Partners does not jointly market.*

OTHER IMPORTANT INFORMATION