

# ACCURATE WEALTH MANAGEMENT

# PRIVACY NOTICE

FACTS	What Does Accurate Wealth Management (“AWM”) Do With Your Personal Information?
<b>Why?</b>	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.
<b>What?</b>	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> <li>• Social Security number and investment experience</li> <li>• Income and risk tolerance</li> <li>• Assets and account transactions</li> </ul> When you are no longer our customer, we continue to share your information as described in this notice.
<b>How?</b>	All financial companies need to share customers’ personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers’ personal information; the reasons AWM chooses to share; and whether you can limit this sharing.

REASONS WE CAN SHARE YOUR PERSONAL INFORMATION	Does AWM share?	Can you limit this sharing?
<b>For our everyday business purposes</b> - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
<b>For our marketing purposes</b> - to offer our products and services to you	Yes	No
<b>For joint marketing with other financial companies</b>	No	AWM doesn’t share
<b>For our affiliates’ everyday business purposes</b> - information about your transactions and experiences	Yes	No
<b>For our affiliates’ everyday business purposes</b> - information about your creditworthiness	No	AWM doesn’t share
<b>For nonaffiliates to market to you</b>	No	AWM doesn’t share
<b>For non-affiliated broker-dealers to supervise registered representatives that are also investment adviser representatives of AWM</b> - client account and transaction information	Yes	Yes
<b>If your investment advisor representative leaves AWM, we may allow her/him to take your contact and account information in order to continue providing services to you</b>	Yes	Yes

WHAT WE DO	
<b>How does AWM protect my personal information?</b>	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. Access to personal information is granted to our home-office associates and investment advisory representatives only to provide investments and services to customers or to serve another legitimate business need.
<b>How does AWM collect my personal information?</b>	We collect your personal information, for example, when you <ul style="list-style-type: none"> <li>• Open an account or give us your contact information</li> <li>• Seek advice about your investments or tell us about your investment or retirement portfolio</li> <li>• Enter into an investment advisory contract</li> <li>• Direct us to buy or sell your securities</li> </ul> We also collect your personal information from others, such as affiliates or other companies.



<b>Why can't I limit all sharing?</b>	Federal law gives you the right to limit only: <ul style="list-style-type: none"> <li>• Sharing for affiliates' everyday business purposes - information about your creditworthiness</li> <li>• Affiliates from using your information to market to you</li> <li>• Sharing for nonaffiliates to market to you</li> </ul> State laws and individual companies may give you additional rights to limit sharing.
<b>What happens when I limit sharing for an account I hold jointly with someone else?</b>	Your choices will apply to everyone on your account.

**DEFENITIONS**

<b>Affiliates</b>	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> <li>• <i>Our affiliates include financial companies such as Accurate Advisory Group.</i></li> </ul>
<b>Nonaffiliates</b>	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> <li>• <i>AWM does not share with nonaffiliates so that they can market to you.</i></li> </ul>
<b>Joint Marketing</b>	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> <li>• <i>AWM doesn't jointly market.</i></li> </ul>

<b>To Limit Our Sharing</b>	<ul style="list-style-type: none"> <li>• Call (866) 241-8078 and ask for the Chief Compliance Officer or</li> <li>• Email to opt out - <a href="mailto:guinta@accuratewealth.com">guinta@accuratewealth.com</a></li> </ul>
<b>Questions?</b>	Call (866) 241-8078

