

# TRUSTSTONE WEALTH PARTNERS, LLC

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## PRIVACY POLICY

At TrustStone Wealth Partners, LLC (“TrustStone”), we deeply value the trust our clients place in us, especially when it comes to the privacy and security of their personal information.

Our Privacy Policy outlines our approach to handling your non-public personal information. It is designed to keep your data confidential and securely protected, allowing us to use or disclose it solely for the purpose of delivering our services to you or as otherwise permitted by law. This policy applies equally to both our current and former clients, ensuring that your privacy is respected and maintained at all times.

## INFORMATION WE COLLECT

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. This can include but is not limited to your Name and Address, Contact Information, Social Security Number, Date of Birth, Assets, Income, Account Balances, and/or Transaction History.

## HOW WE USE & DISCLOSE YOUR INFORMATION

All financial companies need to share client personal information to run their everyday business. We use your information to provide our financial services to you. We may also use your contact information to market our products and services to you, subject to your consent.

We may disclose your information related to the management of your investment account(s) to third parties authorized by you, including the broker/dealers, administrators, custodians, accountants, attorneys, or others necessary to provide our services to you. From time to time, we may be required to give information about our business to regulatory authorities, which may include personal information about you. We do not sell your personal information to anyone.

No mobile information will be shared with third parties/affiliates for marketing or promotional purposes. All other categories exclude text messaging originator opt-in data and consent; this information will not be shared with any third parties.

## HOW INFORMATION IS SAFEGUARDED

We have procedures in place that are designed to protect the security and confidentiality of client information. To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards, secured files and buildings, and strict confidentiality policies.

## YOUR RIGHTS

You have the option to decline to provide your personal information, however, certain information may be required in order to provide certain services. If you do not provide the information requested, we may not be able to provide those services.

***Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.***