

PRIVACY POLICY

What does **Real Wealth Tax Advisors, LLC** do with your personal information?

WHY

While federal law allows financial companies to choose how to share your personal information, you also have the right to limit some, but not all, sharing. We are required to tell you how we collect, share, and protect your personal information.

Please read this notice carefully to understand our privacy policy.

WHAT

The personal information we collect and share depends on the product or service you choose from those we provide. This information can include:

- Your name, birthdate, Social Security Number, government issued IDs
- Your address, telephone number and email address
- Account information such as account numbers, balances and activity
- Your financial/investment history and goals
- Tax information: prior tax returns, employer information (W2/1099 forms), deductions and credits

If you choose to visit our website, we may automatically collect such cache information. We may use such information to gather data that helps us to provide you with services that are relevant to you.

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

Reasons we can share your personal information	Do we share your information?	Can you limit this sharing?
For 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	YES
For marketing purposes — to offer our products and services to you	YES	YES
For joint marketing with other financial companies	YES	YES
For our affiliates' everyday business purposes — information about your transactions and experiences	YES	YES
For our affiliates' everyday business purposes — information about your creditworthiness	NO	YES
For our affiliates to market to you	NO	We Do Not Share
For non-affiliates to market to you	YES	YES

PRIVACY POLICY

WHO WE ARE

Who is providing this notice?
Real Wealth Tax Advisors, LLC ("RWTA")

WHAT WE DO

How does RWTA protect my personal information?

We ensure that our security measures and practices comply with applicable law. Such security measures include transmission encryption, firewall barriers, authentication procedures; and we implement systematic processes and procedures for securing and storing data.

How does RWTA collect my personal information?

We collect your personal information in different ways. For example, when you:

- provide account information
- give us your contact information
- tell us about your investment or retirement portfolio or earnings

We also collect your personal information from other companies

Why can't I limit all sharing?

To provide the best and most efficient services we can, we work with certain third parties to provide essential tasks and services. Federal law gives you the right to limit only sharing for (a) everyday business purposes — information about your creditworthiness, (b) affiliates from using your information to market to you, and (c) non affiliates 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.

NON-AFFILIATES:

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

JOINT MARKETING:

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