RWA Wealth Partners, LLC
PRIVACY NOTICE
March 2024

FACTS	Information about the personal information you provide to RWA Wealth Partners, LLC ("RWA Wealth").

WHY?	Financial services 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 depends on the product or service you have with us. The information can include: ☐ Social Security Number and date of birth ☐ Net worth, income, and payment history ☐ Credit history, credit scores, and tax history

HOW?	All financial services companies need to share their clients' personal information in order to run their everyday business. In the section below, we list the reasons financial services companies can share clients' personal information; the reasons RWA Wealth chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does RWA Wealth share?	Can you limit 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	Yes
For joint marketing with other financial services companies (including our affiliates or other 3rd party firms) – to offer products and services to you	Yes	Yes
For our affiliates' everyday business purposes – such as information about your transactions, experiences, taxes, and creditworthiness	Yes	Yes

TO LIMIT OUR SHARING	1. Call your Advisor at 617-321-2200 2. Send the completed form below by mail or email to privacy@RWAWealth.com *Please note*: If you are a new client, we can begin sharing your information 30 days from the date we've provided this notice. When you are no longer a client, we continue to share your information as described in this document unless you choose to limit our sharing. You may contact us at any time to limit our sharing.

WHO WE ARE	
Who is providing this notice	RWA Wealth Partners, LLC ("RWA Wealth")

WHAT WE DO	
How does RWA Wealth 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 and systems safeguards, secured file storage, and secure office space.
How does RWA Wealth collect my personal information?	We collect your personal information, for example, when you ☐ Engage RWA Wealth to assist with your financial planning and/or management of your assets ☐ Through our onboarding protocols under which we are required to "Know Your Customer" ☐ When you register on our website
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 taxes or creditworthiness ☐ Affiliates from using your personal information to market to you ☐ Sharing for non-affiliates to market to you
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone in your household – unless you tell us otherwise

QUESTIONS?	Call your Advisor at 617-321-2200

MAIL IN FORM TO LIMIT SHARING			
Note that your choice(s) will apply to everyone in your household unless you mark below. ❑ Apply my choices only to me	Mark any/all you want to limit: ❑ Do not use my personal information to market any products and services to me. ❑ Do not allow your affiliates to use my personal information to market any products and services to me. ❑ Do not share my personal information with non-affiliates to market their products and services to me. ❑ Do not share information about my creditworthiness with your affiliates for the everyday business purposes.		
	NAME		MAIL TO: RWA Wealth Partners, LLC 85 Wells Avenue Newton, MA 02459 Attn: Compliance EMAIL TO: privacy@RWAWealth.com
	STREET		
	CITY, STATE		
	ZIP		