

PRIVACY POLICY

At IWP Wealth - Private Client Advisors, LLC (IWP PCA), we are committed to preserving the confidentiality of your personal information. Respecting and protecting client privacy is vital to our business and the following policy is intended to help you better understand our commitment to keeping client information private and secure.

Our commitment to your privacy

We take our responsibility to protect the privacy and confidentiality of our client information very seriously. We maintain physical, electronic, and procedural safeguards to store your information and secure it against unauthorized access, alteration and destruction. Our control policies, for example, authorize access to client information only for employees and other individuals who need the information to complete their work.

Our employees are required to protect the confidentiality of your information and to comply with our established policies. They may access information only when there is an appropriate reason to do so. Employees who violate our Privacy Policy are subject to disciplinary action.

Extent of our Privacy Policy coverage

We provide our Privacy Policy to clients when they open a new account and annually thereafter. If we materially change our Privacy Policy, we will notify you. This Privacy Policy applies to the relationships of both current and former clients of IWP PCA.

How we collect information about our clients

We obtain most of our information from you when you apply for, access, and use the financial services offered by IWP PCA. We limit the collection and use of information to the minimum necessary to provide superior service to you.

Why we gather client information

We use the information we have about you to provide the best possible client service, offer more convenient access to our services, and make a wider range of services and investment options available to you. We do not disclose your personally identifiable information to third parties except as described in this Policy.

Disclosure of information for legal and routine business reasons

We may disclose information when required to do so by law, such as disclosure to attorneys or other professionals. In addition, information may be disclosed for audit purposes or to law enforcement and regulatory agencies. Furthermore, we may disclose information to third party service providers to enable them to provide us with business services such as computer or data maintenance, transactions processing services, or other account maintenance services. Except in those specific limited

situations, we will not make any disclosures of information to other companies who may want to sell their products or services to you without your consent.

IWP may assist clients in obtaining a wide array of financial products and services such as loans, investments, and insurance. We will use the information we have about you, such as net worth, income tax, estate planning, and new account information to provide you with the full range of investment options and services available through IWP PCA.

We believe that the use of your information by IWP PCA employees will result in improved client service and responsiveness, increased access to new service offerings and immediate detection of unusual behavior that will prevent unauthorized transactions or fraud within your account.

In closing

We reserve the right to change this Privacy Policy. The examples contained within this Privacy Policy are illustrations and they are not intended to be exclusive. This notice complies with a recently enacted Federal law and new SEC regulations regarding privacy.

If you have any questions or comments about IWP PCA's Privacy Policy, please contact us at 720-328-9701.