PRIVACY NOTICE

October 2023

RWA Wealth Partners, LLC
85 Wells Avenue, Suite 109
Newton, MA 02459
617·321·2200
www.RWAWealth.com

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.

MARK ANY/ALL YOU WANT TO LIMIT:

Note that your choice(s) will apply to everyone in your household unless you mark below.

☐ **Apply my choices only to me**

☐ 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.

Name ____

Street ____

City, State ____

Zip ____

MAIL TO:
RWA Wealth Partners, LLC
85 Wells Avenue, Suite 109
Newton, MA 02459
Attn: Compliance
EMAIL TO: privacy@RWAWealth.com