

Means Wealth Management – Privacy Policy Notice

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Introduction

The following describes how we collect, share, and protect your personal information. We are bound by professional standards of confidentiality that are even more stringent than just those required by the law. Federal law gives consumers the right to limit some but not all sharing of personal information.

Types of Nonpublic Information (NPI) We Collect

The types of personal information that we collect and share depends on the services we provide to you. This information is either provided to us by you or obtained by us with your authorization. This can include but is not limited to your Social Security number, Date of Birth, banking information, financial account numbers and/or balances, sources of income, and wire transfer information. When you are no longer our client, we will continue to share your information only as described in this notice.

How We Collect Your Personal Information

We collect your personal information, for example, when you:

- Open an account;
- Provide account information;
- Make deposits or withdrawals from your accounts; or
- Make a wire transfer.

We also collect your personal information from other companies.

Protecting Your Personal Information

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards and secured files and building.

Parties to Whom We Disclose Information

All Investment Advisors need to share personal information to run their everyday business. In the section below, we list the reasons that we may share your personal information:

- 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; and
- For marketing – to offer our services to you.

Why can't I limit all sharing?

Federal law gives you the right to limit only the following:

- Sharing for affiliates' everyday business purposes information about your creditworthiness; and
- Affiliates and non-affiliates from using your information to market to you.

Definitions

Affiliates – companies related by common ownership or control. They can be financial and non-financial companies; **Non-affiliates** – companies not related by common ownership or control. They can be financial and non-financial companies.

Please call 207-947-6763 if you have any questions.