

## PRIVACY NOTICE

as of 3.1.24

Wheelhouse Advisory Group, LLC is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us. We maintain a secure office to ensure that your information is not placed at unreasonable risk. We employ a firewall barrier and authentication procedures in our computer environment. We require confidentiality in our agreements with unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors.

The categories of nonpublic information that we collect from you may include personal information such as; name, date of birth, residence or citizenship, contact information (e.g., email address, physical address, telephone number), social security number or tax identification number, information to verify your identity (e.g., driver's license number, passport), investment account details including account balances, assets and liabilities, information about your personal finances, information about your health to the extent that it is needed for the financial planning process, information about transactions between you and third parties, and information from consumer reporting agencies, e.g., credit reports. We use this information to help you meet your personal financial goals and perform our advisory services. Your personally identifiable information will be maintained by us while you are a client, and for a required period thereafter that records are required to be maintained by federal and state securities laws. After that time, information may be destroyed without notice to you.

We disclose limited personal information about you to non-affiliated third parties in connection with the advisory services we provide as permitted or required by law. We share a limited amount of information about you with your brokerage firm to execute securities transactions on your behalf. At times, you may opt out of our sharing of your information with nonaffiliated third parties by notifying us at any time by mail, email, or in person.

**We do not sell your personal information to anyone or provide your personal information to anyone for marketing purposes.**

Federal and state securities regulators may review our firm's records and your personal records as permitted by law.

We will notify you if our privacy policy changes.