



## Privacy Policy

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| <b>FACTS</b> | <b>WHAT DOES INTEGRIS WEALTH MANAGEMENT, LLC DO WITH YOUR PERSONAL INFORMATION?</b> |
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| <b>Why?</b>  | Financial 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.   |
| <b>What?</b> | <p>The types of personal information we collect may include, but not be limited to:</p> <ul style="list-style-type: none"> <li>• Social Security Number</li> <li>• Date of birth</li> <li>• Address</li> <li>• Income</li> <li>• Net worth</li> <li>• Banking information</li> </ul> <p>When you are no longer our client, we do not continue to share your information as described in this notice.</p> |
| <b>How?</b>  | Financial companies need to share clients' personal information to provide their services. In the section below, we list the reasons financial companies might share their clients' personal information; the reasons Integrus Wealth Management, LLC might share your personal information; and whether you can limit this sharing.   |

| Reasons we might share your personal information   | Does Integrus Wealth Management, LLC share? |
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| <b>To provide our services, or as mandated</b> - such as to maintain your account(s), respond to authorities, or to prevent fraud. | Yes   |
| <b>For our marketing</b>   | No  |
| <b>For affiliate marketing</b>   | No  |
| <b>For non-affiliate marketing</b>   | No  |
| <b>For our affiliates everyday business</b> - such as information about your creditworthiness                                      | No  |



## What we do

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| <p><b>How does Integris Wealth Management, LLC protect my personal information?</b></p> | <p>To protect your personal information from unauthorized access, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.</p>   |
| <p><b>How does Integris Wealth Management, LLC collect my personal information?</b></p> | <p>We collect your personal information from you directly, from publicly available sources, or from your other service providers when authorized by you and when, for example:</p> <ul style="list-style-type: none"> <li>• We enter into an advisory agreement.</li> <li>• You open an account.</li> <li>• You seek financial planning advice.</li> <li>• You seek investment advice.</li> <li>• You tell us about your investment portfolio.</li> <li>• You make account deposits or withdrawals</li> </ul>  |
| <p><b>Why can't I limit all sharing?</b></p>  | <p>Federal law gives you the right to limit only:</p> <ul style="list-style-type: none"> <li>• Sharing for affiliates' everyday business – information about your creditworthiness.</li> <li>• Sharing for affiliates to market to you.</li> <li>• Sharing for non-affiliates to market to you.</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing.</p> <ul style="list-style-type: none"> <li>• California regulations require an affirmative opt-in before information can be shared with non-affiliated third parties; an opt-out for sharing amongst affiliates; and a self-addressed, stamped envelope if there are not at least two free ways to respond (e.g., toll-free telephone or website).</li> </ul> |
| <h2>Definitions</h2>  |  |
| <p><b>Affiliates</b></p>  | <p>Companies related by common ownership or control. They can be financial or non-financial companies.</p> <ul style="list-style-type: none"> <li>• Integris Wealth Management, LLC has no affiliates.</li> </ul>  |
| <p><b>Non-affiliates</b></p>  | <p>Companies not related by common ownership or control. They can be financial or non-financial companies.</p>   |