

FACTS	WHAT DOES LIBERTY WEALTH ADVISORS® DO WITH YOUR FINANCIAL INFORMATION?
--------------	---

Why?	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.
-------------	--

What?	<p>The types of personal information we collect and share depends on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> • Social Security number and income • Account balances and assets • Transaction history
--------------	---

How?	All financial companies need to share customers’ personal information to perform their services and run their everyday business. In the section below, we list the reasons financial companies can share their customers’ personal information; the reasons Liberty Wealth Advisors® chooses to share; and whether you can limit this sharing.
-------------	--

Reasons we can share your personal information	Does Liberty Wealth Advisors® share?	Can you limit this sharing?
For our everyday business purposes — such as to process your transactions, maintain your account(s) or respond to court orders and legal investigations	Yes	Yes
For our marketing purposes — to offer our products and services to you	Yes	Yes
For joint marketing with affiliates	Yes	Yes
For joint marketing with non-affiliates	No	We don’t share
For our affiliates’ everyday business purposes — information about your transactions, accounts, etc.	Yes	Yes
For our non-affiliates’ everyday business purposes — information about your transactions, accounts, etc., as necessary	No	We don’t share
For our affiliates to market to you	Yes	Yes
For our non-affiliates to market to you	No	We don’t share

Questions?	Call (800) 448-3550
-------------------	---------------------

Who we are

Who is providing this notice?

Liberty Wealth Advisors®
4851 Tamiami Trail North, Suite 200
Naples, FL 34103

What we do

How does Liberty Wealth Advisors® 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 safeguards (such as password protection or encryption) and restricting access to physical files (such as locked cabinets or building).

How does Liberty Wealth Advisors® collect my personal information?

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

- Open an account
- Seek advice about your investments
- Enter into an investment advisory contract
- Provide us with information about your investment or retirement portfolio or earnings

Why can't I limit all sharing?

Federal law gives you the right to limit only:

- Sharing for affiliates' everyday business purposes
- Affiliates from using your information to market to you
- Sharing for non-affiliates to market to you

State laws and individual companies may give you additional rights to limit sharing.

What happens when I limit sharing for an account I hold jointly with someone else?

Your choices will apply to everyone on your account – unless you tell us otherwise.

Definitions

Affiliates	<p>Companies related by common ownership and/or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none">• We do share with our affiliates.
Non-affiliates	<p>Companies not related by common ownership and/or control. They can be financial or nonfinancial companies.</p> <ul style="list-style-type: none">• We do not share with non-affiliates so that they can market to you.• We may/may not share information about your accounts and transactions with non-affiliates (attorneys, accountants, and other business professionals), as necessary
Joint marketing	<p>A formal agreement between non-affiliated financial companies that together market financial products or service to you.</p> <ul style="list-style-type: none">• We do jointly market with affiliates.• We do not jointly market with non-affiliates.

WEBSITE PRIVACY POLICY

The Liberty Wealth Advisors® website uses cookies, tracking pixels and related technologies. Cookies are small data files that are served by our platform and stored on your device. Our site uses cookies dropped by us or third parties for a variety of purposes including to operate and personalize the website. Also, cookies may also be used to track how you use the site to target ads to you on other websites. By visiting our website, third parties may place cookies on your browsers for targeted advertising purposes. Types of data collected include cookie identifiers, and website activity. That this data may be used by third parties (such as AdRoll) to target advertising on other sites based on your online activity.

If you want to opt-out of receiving targeted advertising, please click the following link:

<http://www.networkadvertising.org/choices/>.