

FACTS

WHAT DOES CONSILIUM WEALTH ADVISORY, LLC DO WITH INFORMATION?

Why?

Financial companies choose how they share your personal information. Federal law gives consumers the right to opt out of not all sharing. Federal law also requires us to tell you how we collect, share, and protect your information. We've written this notice carefully to understand what we do.

What?

The types of personal information we collect and share depend on the product or service you use. The types of information we include:

- Information about your identity, such as your name, address, and social security number
- Account balances and transaction history
- Information about your personal financial profile, such as risk tolerance levels, goals, and investments

How?

All financial companies need to share customers' personal information to run their everyday business. This notice lists the reasons financial companies can share their customers' personal information; the reasons we share; the reasons Consilium Wealth Advisory, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Consilium Wealth Advisory, LLC 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	
For our marketing purposes- to offer our products and services to you	Yes	
For joint marketing with other financial companies	No	
For our affiliates' everyday business purposes- information about your transactions and experiences	No	
For our affiliates' everyday business purposes- information about your creditworthiness	No	
For our affiliates to market to you	No	
For nonaffiliates to market to you	No	

To limit our sharing

- Call 214-299-5114

If you are a *new* customer, we can begin sharing your information 30 days from the date we become your *longer* customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.

Who we are

Who is providing this notice? Consilium Wealth Advisory, LLC ("Consilium")

What we do

How does Consilium protect my personal information? To protect your personal information from unauthorized security measures that comply with federal law. These measures include encrypted and secured files and buildings.

How does Consilium Wealth Advisory, LLC collect my personal information? We collect your personal information, for example, when

- give us your contact information or share your government information
- open an account or give us income information
- enter into an investment advisory contract or service
- provide employment information
- make a wire transfer or money movement authorization
- provide account information

We also collect your personal information from other companies with which we are engaged.

Why can't I limit all sharing? Federal law gives you the right to limit only

- sharing for affiliates' everyday business purposes-information
- affiliates from using your information to market to you
- sharing for nonaffiliates to market to you

State laws and individual companies may give you additional rights.

What happens when I limit sharing for an account I hold jointly with someone else? Your choices will apply to everyone on your account.

Definitions

Affiliates Companies related by common ownership or control, including nonfinancial companies.

- *Not applicable*

Nonaffiliates Companies not related by common ownership or control, including nonfinancial companies.

- *Consilium does not share with non-affiliates so they are not applicable*

Joint marketing A formal agreement between nonaffiliated financial companies to offer financial products or services to you.

- *Consilium does not engage in joint marketing*

YOUR PERSONAL

consumers the right to limit some but
your personal information. Please read

you have with us. This information can

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objectives, assets, liabilities, savings,

your business. In the section below, we
reasons Consilium Wealth Advisory,

Do you limit this sharing?

No

No

We don't share

No

We don't share

We don't share

We don't share

We've sent this notice. When you are *no*

access and use, we use reasonable measures include computer safeguards

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