



## Privacy Policy

We recognize our relationships with current and prospective clients are based on integrity and trust. We work hard to maintain your privacy and to preserve the private nature of our relationship with you. We place the highest value on the information you share with us. We will not disclose your personal information to anyone unless it is required by law or at your direction. We will not sell your personal information. We want you to understand what information we collect, how we use it, and how we protect your personal information.

### Why We Collect Your Information

We gather information about you so we can help design and implement the investment and financial planning related services we provide you, and to comply with the federal and state laws and regulations that govern us.

### What Information We Collect and Maintain

We could collect the following types of “nonpublic personal information” about you:

- Information from our initial meeting or subsequent consultations about your identity, such as your name, address, social security number, date of birth, and financial information.
- Information we generate to service your financial needs.
- Information we could receive from third-parties, such as the custodian who holds your account(s).

### What Information We Disclose

We are permitted by law to disclose nonpublic information about you to unaffiliated third-parties in certain circumstances. We could disclose your information: to individuals and/or entities not affiliated with our firm, including, but not limited to, certain service providers (such as broker-dealers, sub-advisers, or account custodians) as necessary to service your account(s); to your authorized representative or power of attorney; or otherwise permitted to do so in accordance with the parameters of applicable federal and/or state privacy regulations.

Because we share nonpublic information solely to service your account(s), you are not able to opt out of allowing us to share your information. In the event we have a change to our business practices that allows nonpublic information to be shared with other third-parties, our Privacy Policy will be amended to allow you the opportunity to opt-out of such disclosure.

### How We Protect Your Personal Information

Your privacy is of the utmost importance to us. We restrict and limit access to client information only to those who need to carry out their business functions. We safeguard client information by preventing its unauthorized access, disclosure, or use. We maintain physical, electronic, and procedural safeguards to protect your confidential personal information. Arrangements with companies or independent contractors not affiliated with our firm will be subject to confidentiality agreements.

### Former Clients

After you cease to be our client, we are required to maintain certain nonpublic information about you to comply with applicable federal and state regulations. Even if we cease to provide you with financial services, our Privacy Policy will continue to apply to you, and we will continue to treat your nonpublic information with strict confidentiality.

### Contact Us

You are encouraged to discuss any questions regarding our privacy policies and procedures directly with Joel Chouinard, Chief Compliance Officer, at (469) 476-2890 or [joel@sharpedgefinancial.com](mailto:joel@sharpedgefinancial.com) or visit our website at [www.sharpedgefinancial.com](http://www.sharpedgefinancial.com) for further information.