



PRIVACY NOTICE

FACTS	What Does Accurate Wealth Management ("AWM") Do With Your Personal 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?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> • Social Security number and investment experience • Income and risk tolerance • Assets and account transactions When you are no longer our customer, we continue to share your information as described in this notice.
How?	AWM collects and shares your personal information as described below, and whether you can limit this sharing.

REASONS WE CAN SHARE YOUR PERSONAL INFORMATION	Does AWM share?	Can you limit this 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	No
For our marketing purposes – to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	AWM doesn't share
For our affiliates' everyday business purposes – information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes – information about your creditworthiness	No	AWM doesn't share
For our affiliates to market to you	No	AWM doesn't share
For non-affiliates to market to you – investment adviser representatives of AWM – client account and transaction information	Yes	Yes
If your investment advisor representative leaves AWM, we may allow her/him to take your contact and account information in order to continue providing services to you	Yes	Yes

WHAT WE DO

How does AWM 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 and secured files and buildings. We restrict access to your personal information to those employees and representatives only to provide investments and services to customers or to serve another legitimate business need.
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How does AWM collect my personal information?	<p>We collect your personal information, for example, when you:</p> <ul style="list-style-type: none"> • Open an account or give us your contact information • Seek advice about your investments or tell us about your investment or retirement portfolio • Enter into an investment advisory contract • Direct us to buy or sell your securities
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only:</p> <ul style="list-style-type: none"> • Sharing for affiliates' everyday business purposes – information about your creditworthiness • Affiliates from using your information to market to you • Sharing for non-affiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing.</p>
What happens when I limit sharing for an account I hold jointly with someone else?	<p>Your choices will apply to everyone on your account.</p>

DEFINITIONS	
Affiliates	<p>Companies related by common ownership or control. They can be financial and non-financial companies. AWM does not share with affiliates for marketing purposes.</p> <p>AWM's affiliates include Altium Investment Strategies, LLC, a registered investment adviser that manages portfolios of structured notes, DOS strategies, and customized strategies.</p>
Non-affiliates	<p>Companies not related by common ownership or control. They can be financial and non-financial companies. AWM does not share with non-affiliates so they can market to you.</p>
Joint Marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you. AWM does not jointly market.</p>
To Limit Our Sharing	<ul style="list-style-type: none"> • Call us at (813) 994-0984 • Email us to opt out: compliance@accurateadvisory.com
Questions?	<p>Call (813) 994-0984</p>