



PARKWOODS

WEALTH PARTNERS

Privacy Policy As of January 1, 2026

Parkwoods Wealth Partners, LLC is committed to client confidentiality and to protect your privacy. Safeguarding your personal information is something we take very seriously at Parkwoods Wealth Partners. We want to assure you that we will not sell or barter your personal information or our mailing lists to any person or organization. The following information is provided, as required by law, to help you understand our privacy policy and how we will handle and maintain confidential personal information as we fulfill our obligations to protect your privacy. We believe that keeping client information secure is a top priority for us at Parkwoods Wealth Partners "Personal information" refers to the nonpublic financial information obtained by Parkwoods Wealth Partners in connection with carrying out our services. The provisions of this notice will apply to former clients as well as current clients unless we state otherwise.

Information We May Collect

Your personal information, not available publicly, may come from various sources. Information may be learned from you directly, from brokerage statements, or from other information you authorize us to receive. Such information may include Name and Address, Social Security Number, Taxpayer Identification Number, Assets, Income, Account Balance(s), Investment Activity, and Accounts at Other Institutions. Once you have an account with us, we collect and maintain personal information about your transactions including account balances, account positions, and transaction history.

Why We Collect Private Information

To provide you with the best financial services and products available, we need to evaluate your information for any strengths or weaknesses. Our decisions regarding financial products and decisions must be based on sound judgments made from all the information you may have provided us. It also helps us service your accounts and administer our business.

We Will Safeguard Personal Information You Provide

You may rely on us to protect the personal and private information you have entrusted to us. Every precaution, in accordance with federal laws and regulations, is used to limit access to personal information about you to those employees who need to know to assist us in providing products and services to meet your needs. We maintain internal physical, electronic and procedural safeguards to protect personal information about you. Some of the steps we take to safeguard information you provide us include the following:

- Information is provided only to those who have a legitimate reason to know. Employees of our office are required to adhere to company policies and procedures protecting customers'/consumers' information.
- We may share your personal information with external companies to carry out services you have requested or to help us service your account. All companies with whom we do business are to comply with strict standards regarding security and confidentiality, and the information can be used only for the sole purpose of providing service we have requested of the company to perform.
- In accordance with any state or federal laws, we may be required to release information in certain circumstances (i.e. protection against fraud).
- Parkwoods Wealth Partners will maintain strict physical, electronic and procedural measures to protect your information.
- By law, we are required to notify you of our privacy policy on an annual basis. Although we reserve the right to change our policy, we will tell you of the changes promptly.

Importantly, we want to assure you that we will not sell client information to anyone. Your rights as our customer/consumer are a priority to us.

We Limit the Sharing of Information

To protect your privacy, we limit the information we share both within and outside Parkwoods Wealth Partners. We conduct our business with great respect for the confidential nature of the information being provided. We will not share information about you, unless authorized by you, except as outlined below.

Sharing Information Within Our Company

The sharing of information within Parkwoods Wealth Partners allows us to provide you with complete and superior service. We may share within Parkwoods Wealth Partners the information described above in the section captioned "Information We May Collect." This includes information about your transactions or experiences with us, information you supply on your account applications and other forms and information we receive from third parties.

Sharing Information in Other Situations

Parkwoods Wealth Partners may share the information described under the section captioned "Information We May Collect" when we are permitted or required by law. Examples include responding to a subpoena or conduction of a fraud investigation. We also share this information when authorized by you. An Ongoing Commitment to Your Privacy We are just as committed to protecting the privacy of our former customers, as we are our current customers. If you choose to close your account or become an inactive customer, you will continue to be protected by the privacy policies and principles described in the policy.

Form ADV

An updated Form ADV is available in our office. Please contact us if you would like a copy.

At Parkwoods Wealth Partners your business is important to us; we promise to do our best to safeguard your financial assets and personal information about you. If at any time we can help you further, please write or call us at:

Parkwoods Wealth Partners, LLC
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