

MARTINSEN WEALTH MANAGEMENT, LLC (‘MWM’) Privacy Policy

FACTS	WHAT DOES MARTINSEN WEALTH MANAGEMENT, LLC 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 depends on the product or service you have with us. This information can include: <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 run their everyday business. In the section below, we list the reasons financial companies can share their customers’ personal information, the reasons Martinsen Wealth Management, LLC chooses to share, and whether you can limit this sharing.

Reasons MWM can share your personal information	Does MWM 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	N/A
For our affiliates’ everyday business purposes – information about your account(s), transactions, and experiences	Yes	No
For our affiliates’ everyday business purposes – information about your creditworthiness	No	N/A
For our affiliates to market to you	No	N/A
For nonaffiliates to market to you	No	N/A
For nonaffiliates to satisfy their regulatory oversight obligations – information about you, your account and transactions, and experiences	Yes	No
Questions?	Call our offices at 916-458-8199	

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Who we are	
Who is providing this notice?	Martinsen Wealth Management, LLC ("MWM")

What we do	
How does MWM 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, secured files, and office security measures.
How does MWM collect my personal information?	<p>We collect your personal information, for example, when you:</p> <ul style="list-style-type: none"> ▪ Open an account ▪ Transfer funds ▪ Seek advice about your investments ▪ Enter into an investment advisory agreement ▪ Tell us about your investment or retirement portfolio or earnings <p>We also collect your personal information from other companies.</p>

Definitions	
Affiliates	Companies related by common ownership and control. They can be financial and nonfinancial companies.
Nonaffiliates	Companies not related by common ownership and control. They can be financial or nonfinancial companies.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or service to you.