

FACTS**WHAT DOES Northpoint Wealth Financial Services, LLC (Northpoint) 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?	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> ▪ Social Security Number ▪ Income ▪ Bank Information, bank account holder information. ▪ Account balances and transaction history ▪ Account transactions and checking account information ▪ EIN, and other tax related information ▪ Copies of legal identification documents including but not limited to passports, ID cards, utility bills etc. ▪ Payment history, credit history, assets, investment experience, overdraft history, purchase history, risk tolerance, credit card or other debts, mortgage rates and payments; retirement assets, employment information, wire transfer instructions ▪ Corporate structure, net worth, controlling person information, and other items relevant to satisfy KYC and AML policy and procedure <p>When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p>
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 Northpoint chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Northpoint Financial 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	No	Yes
For joint marketing with other financial companies	No	Yes
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	We don't share
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	No	We don't share

Questions?	Call 866.420.7315 or go to e-mail gene.bishop@northpointwealth.com with "Privacy" in subject line.
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Who we are

Who is providing this notice?

Northpoint Wealth Financial Services, LLC, Northpoint Wealth Management, LLC, Northpoint Wealth Insurance Design, LLC, The Family Wealth Consortium, The ParentCare Institute

What we do

How does Northpoint 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.

How does Northpoint collect my personal information?

We collect your personal information, for example, when you

- Open an account or Give us your contact information,
- direct us to buy securities, or Direct us to buy or sell securities,
- Make deposits or withdrawals from your accounts,
- Make a wire transfer, ▪ Show your government issued ID, ▪ Tell us about your investments, retirement portfolios, retirement goals. We also may obtain your personal information from credit bureaus, affiliates, or other companies.

Why can't I limit all sharing?

Federal law gives you the right to limit only

- sharing for affiliates' everyday business purposes—information about your creditworthiness
- 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 to limit sharing.

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- *Our affiliates may contain Northpoint in their name, e.g. Northpoint Wealth Financial Services, LLC, Northpoint Wealth Management, LLC, Northpoint Wealth Insurance Design, LLC, Northpoint Wealth Financial Services, LLC, Northpoint Wealth Management, LLC, Northpoint Wealth Insurance Design, LLC.*

Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- *Custodians and insurance companies and software companies to process your accounts and or financial plan. They may be investment companies which you specifically request.*

Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- *Northpoint does not jointly market.*

Other important information

Federal law gives you the right to limit some but not all marketing from Northpoint affiliates. Federal law also requires us to give you this notice to tell you about your choice to limit marketing from Northpoint affiliates.