Rely Wealth Partners, LLC

FACTS	WHAT DOES RELY WEALTH PARTNERS, LLC DO WITH YOUR FINANCIAL 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: ▪ Social Security number and income ▪ Account balances and assets ▪ Transaction history ▪ Credit history and credit scores
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 Rely Wealth Partners, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Do we share?	Can you limit this sharing?
For our everyday business purposes – such as processing your transactions, maintaining your account(s), responding to court orders and legal investigations, or reporting 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	Not Applicable
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	Not Applicable
For our affiliates to market to you	No	Not Applicable
For nonaffiliates to market to you	No	Not Applicable

Questions?	Call us at (858) 290-3400 or visit our website at www.relywealth.us

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Who we are	
Who is providing this notice?	Rely Wealth Partners, LLC

What we do	
How does Rely Wealth Partners, LLC 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 secure files and buildings.
How does Rely Wealth Partners, LLC collect my personal information?	We collect your personal information, for example, when you: ▪ Open an account ▪ Deposit money ▪ Seek advice about your investments ▪ Enter into an investment advisory contract ▪ Tell us about your investment or retirement portfolio or earnings We also collect your personal information from other companies.

Definitions	
Affiliates	Companies are related by common ownership and control. They can be financial and nonfinancial companies. ▪ *We may share information with our affiliates for our everyday business purposes, including information about your transactions and experiences.*
Nonaffiliates	Companies not related by common ownership and control. They can be financial or nonfinancial companies. ▪ *We do not share with nonaffiliates so that they can market to you.*
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. ▪ *We do not jointly market.*

Other important information