

Peterson Rogers Private Wealth, LLC

Privacy Notice 2024

WHAT DOES PETERSON ROGERS PRIVATE WEALTH, LLC DO WITH YOUR PERSONAL INFORMATION?

Financial companies may choose how they collect and 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.

The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Personal Information, including name, address, date of birth, social security number and investment experience
- Account balances and transaction history
- Assets and income

When you are *no longer* our customer, we continue to share your information as described in this notice.

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 PRPW chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does PRPW 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 our affiliates to market to you	No	We don't share
For non-affiliates to market to you	No	We don't share
For our affiliates' everyday business purposes— information about your transactions and experiences	No	We don't share
For our affiliates' everyday business purposes— information about your creditworthiness	No	We don't share
For joint marketing with other financial companies	No	We don't share

Who we are	
Who is providing this notice?	Peterson Rogers Private Wealth, LLC, , an SEC-registered investment adviser.

What we do	
How does PRPW protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. We maintain physical, electronic and procedural safeguards to guard your personal information and the integrity and security of our databases. These measures include computer safeguards and secured files and buildings.
How does PRPW collect my personal information?	We collect your personal information, for example, when you: <ul style="list-style-type: none"> ■ Enter into an investment advisory agreement ■ Open an account or deposit money ■ Seek advice about your investments
Why can't I limit all sharing?	Federal law gives you the right to limit only: <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. See below for more on your rights under state law.</p>

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and non-financial companies. <ul style="list-style-type: none"> ■ N/A
Non-affiliates	Companies not related by common ownership or control. They can be financial and non-financial companies. <ul style="list-style-type: none"> ■ <i>PRPW does not share with non-affiliates so they can market to you</i>
Joint marketing	A formal agreement between non-affiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ■ <i>PRPW does not jointly market</i>

For questions call (866) 847-9454 or email: admin@petersonrogers.com