furthermore

CLIENT PRIVACY NOTICE

How We Protect Your Privacy

Effective October 12 2026

Your trust matters to us. Furthermore Wealth uses your personal information only to serve you, operate our firm, and meet our legal responsibilities. We do not sell your personal information.

What We Collect

We collect information needed to understand your financial life and provide advice. This may include:

- Your name, address, phone number, email address, date of birth, and identification information.
- Your income, assets, debts, taxes, accounts, investments, insurance, and financial goals.
- Information about your family, beneficiaries, business interests, retirement, and estate plans.
- Our communications with you and limited technical information used to operate and secure our website.

Why We Use It

We use your information to create and maintain your financial plan, manage investments, open and service accounts, communicate with you, process your requests, protect against fraud, maintain required records, and comply with the law.

When We Share It

We share information only when it is needed to serve you or when the law allows or requires it. This may include sharing information with:

- Custodians, financial institutions, and investment managers used for your accounts.
- Technology, communication, document, cybersecurity, and recordkeeping providers that support our firm.
- Accountants, attorneys, auditors, compliance consultants, insurers, and regulators.
- Other people or organizations when you ask us to or give us permission.

We do not share your personal information with outside companies for their independent marketing.

How We Protect It

We use administrative, technical, and physical safeguards designed to protect your information. Access is limited to people who need it to perform their work. We also expect the service providers we use to protect the information they receive.

Former Clients and Updates

We protect information about former clients in the same way. We may update this notice when our practices, services, or legal responsibilities change and will provide the current notice as required.

Questions

Please contact us if you have questions about this notice or believe your information needs to be corrected.

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