

# Privacy Policy Notice

Rev. January 2025

<b>FACTS</b>	<b>What does Earned Wealth Advisors, LLC do with your Financial Information?</b>	
<b>Why?</b>	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.	
<b>What?</b>	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"><li>▪ Social Security number and income</li><li>▪ Account balances and assets</li><li>▪ Transaction history and investment experience</li></ul>	
<b>How?</b>	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 Earned Wealth chooses to share; and whether you can limit this sharing.	
Reasons we can share your personal information	Does Earned Wealth share?	Can you limit this sharing?
<b>For our everyday business purposes –</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
<b>For our marketing purposes –</b> to offer our products and services to you	Yes	No
<b>For joint marketing with other financial companies</b>	No	We don't share
<b>For our affiliates to market to you</b>	Yes	Yes
<b>For nonaffiliates to market to you</b>	No	We don't share
<b>Questions?</b>	Call (877) 939-2500 or go <a href="http://www.earnedwealth.com/legal/privacy-policy">www.earnedwealth.com/legal/privacy-policy</a>	

<b>Who we are</b>	
<b>Who is providing this notice?</b>	Earned Wealth Advisors, LLC
<b>What we do</b>	
<b>How does Earned Wealth protect my personal information?</b>	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 building.
<b>How does Earned Wealth collect my personal information?</b>	<p>We collect your personal information, for example, when you:</p> <ul style="list-style-type: none"> <li>▪ Open an account</li> <li>▪ Deposit money</li> <li>▪ Seek advice about your investments</li> <li>▪ Enter into an investment advisory contract</li> <li>▪ Tell us about your investment or retirement portfolio or earnings</li> </ul> <p>We also collect your personal information from other companies.</p>
<b>Definitions</b>	
<b>Affiliates</b>	Companies related by common ownership and control. They can be financial and nonfinancial companies.
<b>Non-Affiliates</b>	<p>Companies not related by common ownership and control. They can be financial or nonfinancial companies.</p> <ul style="list-style-type: none"> <li>▪ <i>We do not share with non-affiliates so that they can market to you.</i></li> </ul>
<b>Joint marketing</b>	<p>A formal agreement between non-affiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> <li>▪ <i>We do not jointly market.</i></li> </ul>

YOUR CHOICE TO LIMIT MARKETING

The Earned Wealth group of companies is providing this joint notice.

Federal law gives you the right to limit some but not all marketing from the Earned Wealth group of companies. Federal law also requires us to give you this notice to tell you about your choice to limit marketing from the Earned Wealth group of companies.

You may limit the Earned Wealth group of companies from marketing their products and services to you based on your personal information that they receive from other Earned Wealth companies. This information includes your income, your account history with us, and demographic information.

Your choice to limit marketing offers from the Earned Wealth group of companies will apply until you tell us to change your choice.

**To limit marketing offers, contact us:**

- **By telephone: (877) 939-2500**
- **By mail: Check the box and complete the form below, and send the form to:**

Earned Wealth Advisors, LLC  
165 Lennon Lane, Suite 200  
Walnut Creek, CA 94598

- Do not allow your affiliates to use my personal information to market to me

\_\_\_\_\_  
Client Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Earned Wealth Group of Companies:

- Earned Wealth Advisors, LLC (a registered investment adviser)
- TD Payroll LLC
- TD Advisors LLC
- PensionOne Advisors LLC
- Earned Wealth Operating Company, Inc.