

## FACTS

## WHAT DOES TRIAD WEALTH PARTNERS 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?

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

- Social Security number and income
- Account balances and investment transactions
- Tax information and business information

## 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 Triad Wealth Partners chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Triad Wealth Partners 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' everyday business purposes –</b> investment transaction information	Yes	No
<b>For our affiliates' everyday business purposes –</b> information about your financial situation and goals	Yes	No
<b>For our affiliates to market to you</b>	Yes	Yes
<b>For nonaffiliates to market to you</b>	No	We don't share

## To limit our sharing

- Call (785) 830-0000
- Emails us at: [info@triadria.com](mailto:info@triadria.com)

If you are a *new* customer, we can begin sharing your information 30 days from the date we sent this notice. When you are *no longer* our customer, we continue to share your information as described in this notice.

However, you can contact us at any time to limit our sharing.

## Questions?

Call (785) 830-0000 or visit <https://triadria.com/>.

## Who we are

<b>Who is providing this notice?</b>	Triad Wealth Partners
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## What we do

### How does Triad Wealth Partners 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. We also use industry standard security measures that include strong passwords as well as restrictive permission settings and access.

### How does Triad Wealth Partners collect my personal information?

We collect your personal information, for example, when you:

- open an account or transfer funds
- provide us with your account information
- work with our affiliated entity, Triad Partners, LLC

### 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.

### What happens when I limit sharing for an account held jointly with someone else?

Your choices will apply to everyone on your account—unless you tell us otherwise.

## Definitions

### Affiliates

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

- Triad Partners, LLC

### Nonaffiliates

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

- Triad Wealth Partners does not share with nonaffiliates so they can market to you.

### Joint marketing

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

- Triad Wealth Partners does not jointly market.

## Other important information

We may share your information with law enforcement or other government agencies as required by law or for the purposes of limiting fraud. We reserve the right to disclose your personally identifiable information when we believe that disclosure is necessary to protect our rights or to comply with a judicial proceeding, court order, legal process, government request, or to comply with any applicable law or regulation, foreign or domestic.