WATERSHED PRIVATE WEALTH LLC

1415 W. 22nd St Tower Floor Oak Brook, IL 60523

708-645-3848 – info@watershedprivatewealth.com

PRIVACY POLICY

Investment advisers are required by law to inform their clients of their policies regarding privacy of client information. We are bound by professional standards of confidentiality that are even more stringent than those required by law. Federal law gives the customer the right to limit some but not all sharing of personal information. It also requires us to tell you how we collect, share, and protect your personal information.

TYPES OF NONPUBLIC PERSONAL INFORMATION (NPI) WE COLLECT

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. This can include but is not limited to your Social Security Number, Date of Birth, Banking Information, Financial Account Numbers and/or Balances, Sources of Income, and Credit Card Numbers or Information. When you are no longer our customer, we may continue to share your information only as described in this notice.

PARTIES TO WHOM WE DISCLOSE INFORMATION

All Investment Advisers may need to share personal information to run their everyday business. In the section below, we list the reasons that we may share your personal information:

- For 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;
- For our marketing – to offer our products and services to you;
- For joint marketing with other financial companies;
- For our affiliates' everyday business purposes – information about your transactions and experiences and information about your creditworthiness; or
- For non-affiliates to market to you.

If you are a new customer we may begin sharing your information on the day you sign our agreement. When you are no longer our customer, we may continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.

PROTECTING CONFIDENTIALITY OF CURRENT AND FORMER CLIENT'S INFORMATION

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards and secured files and building.

FEDERAL LAW GIVES YOU THE RIGHT TO LIMIT SHARING – OPTING OUT

Federal law allows you the right to limit the sharing of your NPI by "opting-out" of the following: sharing for affiliates' everyday business purposes – information about your creditworthiness; or sharing with affiliates or non-affiliates who use your information to market to you. State laws and individual companies may give you additional rights to limit sharing. Please notify us immediately if you choose to opt out of these types of sharing.

DEFINITIONS: Affiliates – companies related by common ownership or control. They can be financial and non-financial companies; Non-affiliates – companies not related by common ownership or control. They can be financial and non-financial companies; Joint marketing – a formal agreement between non-affiliated financial companies that together market financial products or services to you.

Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

WATERSHED PRIVATE WEALTH LLC

1415 W. 22nd St Tower Floor Oak Brook, IL 60523

708-829-4480 – brendan@watershedprivatewealth.com

PRIVACY POLICY

Investment advisers are required by law to inform their clients of their policies regarding privacy of client information. We are bound by professional standards of confidentiality that are even more stringent than those required by law. Federal law gives the customer the right to limit some but not all sharing of personal information. It also requires us to tell you how we collect, share, and protect your personal information.

MOBILE OPT-IN PREVENTION

Mobile information will not be shared with third parties/affiliates for marketing/promotional purposes. All the above (or below) categories exclude text messaging originator opt-in data and consent; this information will not be shared with any third parties.

HOW WE COLLECT PERSONAL INFORMATION

This Privacy Statement does apply to personal information or information we may collect about you from a variety of other sources and in connection with:

- Watershed Private Wealth's website and social media: Your visits to our website and our pages on various social media platforms.
- Events: Your registration, attendance or participation in a conference, meeting or other event (virtual or in-person).
- General communications: Your communications with our employees through their Watershed - issued devices, email addresses, phones, and applications, or more generally in their professional capacity via phone, email, chat, in person or otherwise. This applies to a wide variety of situations in which you communicate with our employees – for example, if you are calling to inquire about our services.
- Visits: Your visits to our offices.
- Publicly available databases: We may collect information about you that is publicly available, such as websites.
- Third Parties: Vendors, partners, or other or other third parties may send us your information.

- For 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;
- For our marketing – to offer our products and services to you;
- For joint marketing with other financial companies;
- For our affiliates' everyday business purposes – information about your transactions and experiences and information about your creditworthiness; or
- For non-affiliates to market to you.

If you are a new customer we may begin sharing your

Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.