

## White Oak Wealth Partners PRIVACY NOTICE

<b>FACTS</b>	<b>WHAT DOES WHITE OAK WEALTH PARTNERS (“WHITE OAK”) DO WITH YOUR PERSONAL 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>	<p>The type of personal information we collect and share depends on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> <li>Social Security number</li> <li>Income</li> <li>Assets</li> <li>Risk tolerance</li> <li>Investment experience</li> <li>Employment information</li> </ul> <p>When you are no longer our customer, we continue to share information about you as described in this notice.</p>
<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 White Oak chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does White Oak share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s) or respond to court orders and legal investigations.	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	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 non-affiliates to market to you	No	We don’t share

<b>To limit our sharing</b>	<p>Please note: 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.</p>
<b>Questions?</b>	Call (919) 858-6490

What we do	
How does White Oak 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.
How does White Oak collect my personal information?	We collect your personal information, for example, when you: <ul style="list-style-type: none"> <li>• Enter into an investment advisory contract</li> <li>• Seek financial advice</li> <li>• Give us your contact information</li> <li>• Tell us about your investment or retirement portfolio</li> <li>• Give us your employment history</li> </ul>
Why can't I limit all sharing?	Federal law gives you the right to limit only: <ul style="list-style-type: none"> <li>• Sharing for affiliates' everyday business purposes—information about your creditworthiness</li> <li>• Affiliates from using your information to market to you</li> <li>• Sharing for non-affiliates to market to you</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing.</p>
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account – unless you tell us otherwise.

Definitions	
Affiliates	<i>Companies related by common ownership or control. They can be financial and non-financial companies.</i>  White Oak does not have any affiliates.
Non-affiliates	<i>Companies not related by common ownership or control. They can be financial and non-financial companies.</i>  White Oak does not share with non-affiliates so they can market to you.
Joint Marketing	<i>A formal agreement between non-affiliated financial companies that together market financial products or services to you.</i>  White Oak does not jointly market.