

FACTS

WHAT DOES JULIE A WURST, CFP®, LLC (“JW”) 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 types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security number and financial information
- Investment holdings and investment experience
- Financial goals and financial history

When you are *no longer* our customer, we continue to share your information as described in this notice.

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 JW chooses to share; and whether you can limit this sharing.

| Reasons we can share your personal information | Does JW share? | Can you limit this sharing? |
|---|----------------|-----------------------------|
| For our everyday business purposes— such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or to meet our compliance requirements | 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 |

Questions?

Call (253) 209-1130

| Who we are | |
|--|---|
| Who is providing this notice? | Julie A. Wurst, CFP®, LLC |
| What we do | |
| How does JW 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 restrict access to your personal information to those individuals who need to know the information to provide services and/or products to you. |
| How does JW collect my personal information? | We collect your personal information, for example, when you <ul style="list-style-type: none"> ■ correspond with us or obtain information about our services ■ make investments or provide financial profile information |
| Why can't I limit all sharing? | Federal law gives you the right to limit only <ul style="list-style-type: none"> ■ sharing for affiliates' everyday business purposes—information about your creditworthiness ■ affiliates from using your information to market to you ■ sharing for non-affiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing and will be described below, if applicable.</p> |
| Definitions | |
| Affiliates | Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ■ JW does not have any affiliates |
| Non-affiliates | Companies not related by common ownership or control. They can be financial and nonfinancial companies. Examples of non-affiliates: <ul style="list-style-type: none"> ■ Your qualified custodian (e.g., Charles Schwab & Co., Inc.) ■ Regulators with jurisdiction over JW |
| Joint marketing | A formal agreement between non-affiliated financial companies that together market financial products or services to you. JW has no joint marketing agreements. |