NOTICE OF PRIVACY PRACTICES

September 2026

Advisor Share Wealth Management, LLC
and Associated Companies

In accordance with Securities and Exchange Commission's Regulation S-P and the Gramm-Leach-Bliley Act, this notice outlines our privacy practices. We collect **"nonpublic personal financial information"** for investment and insurance services, including data regarding accounts, transactions, and, as updated, customer information received from external custodians.

- **Security & Safeguards:** We maintain physical, electronic, and procedural safeguards for all data. These now extend specifically to all digital, cloud-based, and remote work environments.
- **Information Sharing:** We do not disclose customer information to third parties, except as legally permitted to service your account or execute our client marketing programs.
- **Customer Privacy:** Employees are prohibited from sharing information externally.

FACTS: What Does ADVISOR SHARE WEALTH MANAGEMENT (ASWM) 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 numbers 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 ASWM chooses to share; and whether you can limit this sharing.

Sharing Policies

Reasons we can share your personal information	**Does ASWM 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 report to credit bureaus.	**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 nonaffiliates to market to you	**No**	**We don't share**

Who we are	
Who is providing this notice?	**Advisor Share Wealth Management, LLC**

What we do

How does ASWM 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 multi-factor authentication (MFA), encrypted cloud systems, computer safeguards, and secured files and buildings. We restrict access to those individuals who need it to provide services to you.
How does ASWM collect my personal information?	We collect your personal information, for example, when you open an account, deposit funds, or via authorized third-party data transfers.
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. See below for more on your rights under state law (including California residents).

Definitions

Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. ▪ **Our affiliates include Synergy Asset Management LLC**
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. ▪ **Our nonaffiliates include our primary custodial partners e.g., Charles Schwab, Inc. and TD Ameritrade.**
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. ▪ **ASWM does not engage in joint marketing.**

Other Important Information

ASWM will provide a current copy of our privacy notice to all active clients on an annual basis to ensure complete transparency regarding our information-gathering, cloud safeguarding, and partner service-provider practices. Our current notice is also always available upon request.

California Residents

We comply with the California Information Privacy Act, sharing information only as permitted by law. In accordance with California law, we will not share information we collect about California residents with outside companies, except as permitted by law, such as with the consent of the customer or to service a customer's accounts.

Questions or Feedback?

If you have any questions, concerns, or feedback regarding this privacy notice or how we safeguard your personal information, please contact our Chief Compliance Officer (CCO):

- **Attention:** Chief Compliance Officer
- **Phone:** 206-803-6216
- **Email:** alucich@lawvisory.com