

FACTS	What Does Rothschild Wealth Partners Do With Your Personal Information?
WHO WE ARE	Who is providing this notice? This joint privacy notice is provided by Rothschild Financial Partners, LLC; Rothschild Wealth LLC; and Rothschild Investment LLC (collectively, "Rothschild Wealth Partners").
THE LAW	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.
OUR POLICY	The types of personal information we collect and share depend on the product or service you have with us. This information can include: • Income • Employment and residential information • Social security number • Cash balance • Security balances • Transaction detail history • Investment objectives, goals, and risk tolerance When you are no longer a client, we continue to share your information as described in this notice.
YOUR RIGHTS	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 Rothschild Wealth Partners chooses to share; and whether you can limit this sharing.

REASONS WE CAN SHARE YOUR PERSONAL INFORMATION	DOES ROTHSCHILD WEALTH PARTNERS SHARE?	CAN YOU LIMIT THIS SHARING?
For our everyday business purposes—such as to provide advice, process your transactions, and maintain your account(s)	Yes	No
For our marketing purposes—to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	No
For our affiliates' everyday business purposes—information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes—information about your creditworthiness	No	We do not share
For our affiliates to market to you	Yes	Yes
For non-affiliates to market to you	Yes	Yes

**TO LIMIT
OUR SHARING**

Phone: (630) 448-5711 Email: privacy@rothschildwealth.com

Please include your name and mailing address so that we can identify your relationship with us. Do not include your Social Security number or account number.

If you are a new client, we may begin sharing your information 30 days from the date we sent this notice. You may contact us at any time to limit our sharing.

SHARING PRACTICES

How often does Rothschild Wealth Partners notify me about their practices?	We must notify you about our sharing practices when you become a client or if we change our information sharing policies and procedures.
How does Rothschild 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.
How does Rothschild Wealth Partners collect my personal information?	We collect your personal information, for example, when you • establish an investment advisory relationship • contract for financial planning services • open an account or deposit money with custodians • purchase or sell securities with executing broker-dealers We also collect your personal information from others, such as custodians, broker-dealers, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit sharing only for • affiliates' everyday business purposes—information about your creditworthiness • affiliates to market to you • non-affiliates to market to you State laws and individual companies may give you additional rights to limit sharing.

DEFINITIONS

Everyday Business Purposes	The actions necessary by financial companies to run their business and manage customer accounts, such as providing investment advisory and financial planning advice, processing securities transactions, and otherwise providing financial services to you.
Affiliates	Our affiliates include financial services, insurance, and other companies related by common ownership or control. These include Rothschild Financial Partners, LLC; Rothschild Wealth LLC; Rothschild Investment LLC; Rothschild Insurance Services, LLC; MM Insurance Services, LLC; and Advisor OP [full legal name]. Rothschild Wealth Partners is also affiliated with Singularity Financial Partners, LLC.
Non-Affiliates	Companies not related by common ownership or control. They can be financial and non-financial companies. Rothschild Wealth Partners may share information with non-affiliates for whom we have a contractual relationship so they can market to you.
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.