

**FACTS****WHAT DOES Northpoint Wealth Financial Services, LLC (Northpoint) DO WITH YOUR PERSONAL INFORMATION?**

<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>	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> <li>■ Social Security number and Name, address, e-mail and telephone number</li> <li>■ date of birth and employer,</li> <li>■ salary, and or net worth</li> </ul>
<b>How?</b>	All financial companies need to share <b>some of</b> personal information to run their everyday business. In the section below, we list the reasons financial companies can share their <b>some of</b> personal information; the reasons <b>our company</b> chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Northpoint Financial share?	Can you limit this sharing?
<b>For our everyday business purposes—</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
<b>For our marketing purposes—</b> to offer our products and services to you	No	Yes
<b>For joint marketing with other financial companies</b>	No	Yes
<b>For our affiliates' everyday business purposes—</b> information about your transactions and experiences	Yes	No
<b>For our affiliates' everyday business purposes—</b> information about your creditworthiness	No	We don't share
<b>For our affiliates to market to you</b>	Yes	Yes
<b>For nonaffiliates to market to you</b>	No	We don't share

<b>To limit our sharing</b>	<ul style="list-style-type: none"> <li>■ Call 866.420.7315 and discuss with an Advisor.</li> <li>■ Send an e-mail to <a href="mailto:opt-out@northpointwealth.com">opt-out@northpointwealth.com</a> with the words "opt-out" in the subject lines and your Northpoint account number in the body copy.</li> <li>■ Mail the form below</li> </ul> <p><b>Please note:</b></p> <p>If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p> <p>However, you can contact us at any time to limit our sharing.</p>
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<b>Questions?</b>	Call 866.420.7315 or e-mail <a href="mailto:gene.bishop@northpointwealth.com">gene.bishop@northpointwealth.com</a> with "Privacy" in subject line.
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**Mail-in Form**

Mark any/all you want to limit:

## Who we are

### Who is providing this notice?

Northpoint Wealth Financial Services, LLC; Northpoint Wealth Management, LLC; Northpoint Wealth Financial Insurance Design, LLC; and The Family Wealth Consortium, LLC.

## What we do

### How does Northpoint 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 Northpoint collect my personal information?

We collect your personal information, for example, when you

- open an account                      OR make deposits or withdrawals from your accounts,
- direct us to buy securities        OR direct us to sell securities
- tell us about your investments, retirement portfolios, retirement goals

We also may obtain your personal information from credit bureaus, affiliates, or other companies.

### 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.

### What happens when I limit sharing for an account I hold jointly with someone else?

Your choices apply to everyone on your accounts.

## Definitions

### Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- *Our affiliates may contain Northpoint in their name, custodians and insurance companies and software companies to process your accounts and or financial plan.*

### Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- *Northpoint does not share with non affiliates.*

### Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- *Northpoint does not jointly market.*

## Other important information

