

PRIVACY STATEMENT

Brightworth is committed to safeguarding the confidential information of its clients. We hold all personal information provided to our firm in the strictest confidence. These records include all personal information collected from current or former clients in connection with any of the services provided by Brightworth. Our policy with respect to your personal information is listed below.

- As part of our comprehensive wealth management services, we collect non-public personal financial information (encompassing investments, employee benefits, taxes, etc.), as well as health and family information as needed to provide our services to you from the following sources: (i) information we receive from you on applications or other forms, or in the course of communications between you or your designees and our staff; (ii) information about your transactions with us or others.
- In the normal course of business, we disclose personal information to companies that help us process or service your transactions or account(s), including, for example, companies that provide custodial services, trust services, and/or third party administrative (TPA) services for your investment portfolios. Examples of the types of information provided include name, address, phone number, Social Security number, and information about your investments and investment experience.
- In the normal course of business, we may also use unaffiliated/third party service providers to collect, analyze, maintain, store, and /or archive records and other data (in paper, electronic or digital form) that include client personal information. Examples of such services include document storage, email archival, contact and portfolio management, financial planning and related software, online client portal and/or aggregation services. Brightworth has a contractual relationship with these companies which does not permit them to use confidential client data for any other purposes.
- As part of our comprehensive wealth management services and with your authorization, we will discuss your financial information, as applicable with your other advisors. For instance, we may assist your CPA in compiling information for your tax returns. We may provide information to the attorney who prepares your estate planning documents.
- We may disclose or report personal information in limited circumstances where we believe in good faith that disclosure is required or permitted under law, for example, to cooperate with SEC regulators or other law enforcement authorities.
- We restrict access to personal information to our employees and agents for business purposes only. We maintain physical, electronic, and procedural safeguards to protect your personal information.
- We do not sell your personal information to anyone.

We understand the trust you have placed in us as your wealth advisor. You rely on us to act in your interest *and* protect the confidentiality of your personal information. Our privacy policy reflects the desire to safeguard your data while providing the best possible service to you. Please call us at (404) 760-9000 or toll-free at (800) 218-5174 if you would like to discuss any aspect of our privacy policy.