

## FACTS

### WHAT DOES HP WEALTH MANAGEMENT, LLC 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.
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<b>What?</b>	<p>The types of personal information we collect, and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> <li>• Social Security Number and income;</li> <li>• Assets and transaction history; and</li> <li>• Investment experience and risk tolerance.</li> </ul> <p>When you are <i>no longer</i> a client, we continue to share your information as described in this notice.</p>
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<b>How?</b>	All financial companies need to share clients' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients' personal information; the reasons HP Wealth Management ("HPWM") choose to share; and whether you can limit this sharing.
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Reasons we can share your personal information	Does HPWM 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.	YES	YES
<b>For joint marketing with other financial companies</b>	NO	We do not share
<b>For our affiliates' everyday business purposes</b> – Information about your transactions and experiences.	YES	YES
<b>For our affiliates to market to you</b>	YES	YES
<b>For non-affiliates to market to you</b>	YES	YES

<b>To limit our sharing</b>	<b>Please note:</b> If you are a new Client, we can begin sharing your information 30 days from the date we sent this notice. When you are no longer our client, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing. By executing an Investment Advisory Agreement with HP Wealth Management, LLC, the Client agrees to "opt-in" to this privacy policy.
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<b>Questions?</b>	Call 307.745.7241 or go to <a href="http://www.highpointcpa.com">www.highpointcpa.com</a>
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Who we are	
Who is providing this notice?	HP Wealth Management, LLC (“HPWM”)

What we do	
How does HPWM 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 HPWM collect my personal information?	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> <li>• open an account or give us contact information;</li> <li>• enter an investment adviser contract or give us your income information;</li> <li>• tell us about your investment or retirement portfolio.</li> </ul> <p>We also collect your personal information from other companies.</p>
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only:</p> <ul style="list-style-type: none"> <li>• Sharing for affiliates' everyday business purposes – information about your creditworthiness;</li> <li>• Affiliates from using your information to market to you; and</li> <li>• Sharing for nonaffiliates to market to you.</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing.</p>
What happens when I limit sharing for an account that I hold jointly with someone else?	Your choices will apply to everyone on your account – unless you tell us otherwise.

Definitions	
<b>Affiliates</b>	Companies related by common ownership or control. They can be financial and nonfinancial companies.
<b>Non-affiliates</b>	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
<b>Joint Marketing</b>	A formal agreement between non-affiliated financial companies that together market financial products or services to you.

Other important information	
By signing and executing HP Wealth Management, LLC's Agreement, I acknowledge that I have fully read and understand this Privacy Policy and opt-in as outlined above. I understand that if I have any questions or concerns about this policy, it is my responsibility to discuss this with my financial professional.	

## FACTS

### WHAT DOES HIGHPOINT CPAS, LLC 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.
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<b>What?</b>	<p>The types of personal information we collect, and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> <li>• Social Security number and income;</li> <li>• assets and transaction history; and</li> <li>• investment experience and risk tolerance.</li> </ul> <p>When you are <i>no longer</i> a client, we continue to share your information as described in this notice.</p>
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<b>How?</b>	All financial companies need to share clients' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients' personal information; the reasons HighPoint CPAs, LLC ("HPCPA") choose to share; and whether you can limit this sharing.
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Reasons we can share your personal information	Does HPCPA 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.	YES	YES
<b>For joint marketing with other financial companies</b>	NO	We do not share
<b>For our affiliates' everyday business purposes –</b> Information about your transactions and experiences.	YES	YES
<b>For our affiliates to market to you</b>	YES	YES
<b>For non-affiliates to market to you</b>	YES	YES

<b>To limit our sharing</b>	<b>Please note:</b> If you are a new Client, we can begin sharing your information 30 days from the date we sent this notice. When you are no longer our client, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing. By executing an engagement or proposal with HighPoint CPAs, LLC, the Client agrees to "opt-in" to this privacy policy.
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<b>Questions?</b>	Call 307.745.7241 or go to <a href="http://www.highpointcpa.com">www.highpointcpa.com</a>
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Who we are	
Who is providing this notice?	HighPoint CPAs, LLC (“HPCPA”)

What we do	
How does HPCPA 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 HPCPA collect my personal information?	We collect your personal information, for example, from <ul style="list-style-type: none"> <li>• interviews and phone calls with you;</li> <li>• letters or e-mails from you;</li> <li>• tax return organizers;</li> <li>• other documents we use in preparing your tax return;</li> </ul> We also collect your personal information from other companies.
Why can’t I limit all sharing?	Federal law gives you the right to limit only: <ul style="list-style-type: none"> <li>• sharing for affiliates’ everyday business purposes – information about your creditworthiness;</li> <li>• affiliates from using your information to market to you; and</li> <li>• sharing for nonaffiliates to market to you.</li> </ul> State laws and individual companies may give you additional rights to limit sharing.
What happens when I limit sharing for an account that I hold jointly with someone else?	Your choices will apply to everyone on your account – unless you tell us otherwise.

Definitions	
<b>Affiliates</b>	Companies related by common ownership or control. They can be financial and nonfinancial companies.
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<b>Joint Marketing</b>	A formal agreement between non-affiliated financial companies that together market financial products or services to you.

Other important information	
By signing and executing an agreement with HighPoint CPAs, LLC, I acknowledge that I have fully read and understand this Privacy Policy and opt-in as outlined above. I understand that if I have any questions or concerns about this policy, it is my responsibility to discuss this with HighPoint CPAs, LLC.	

## Confidentiality and Security of Nonpublic Personal Information

Except as otherwise described in this notice, we restrict access to nonpublic personal information about you to employees of our firm and other parties who must use that information to provide services to you. Their right to further disclose and use the information is limited by the policies of our firm, applicable law, our Code of Professional Conduct and nondisclosure agreements where appropriate. We also maintain physical, electronic and procedural safeguards in compliance with applicable laws and regulations to guard your personal information from unauthorized access.

In the interest of facilitating our services to you, we may communicate by e-mail. Such communications may include information that is confidential to you or your company. While we will use our best efforts to keep such communications secure in accordance with our obligations under applicable laws and professional standards, you recognize and accept that we have no control over the unauthorized interception of these communications once they have been sent and that you consent to our use of these electronic devices during our engagements.

If you have any concerns about the disclosure of your personal information to third parties or wish to stop any disclosure that has been noted above, please contact us.