*PWJohnson Wealth Management*

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# Privacy Act Disclosure

Our firm is committed to safeguarding the confidential information of our clients. We hold all personal data provided to us in the strictest confidence. Indeed, we require your specific permission before we will discuss your affairs with anyone external to the firm. The information we compile includes that provided by you on our questionnaire, collected from your previous advisors, if any, and from statements and other sources that you give us.

We have *never* disclosed information to nonaffiliated third parties (such as brokerage firms, credit-card or insurance companies), except as permitted by law, or in carrying out the duties for which you retained us.
We do not anticipate any change to this policy, and, in the unlikely event that we were to change it, we would contact you prior to such a change and give you the option to protect your information.

As you know, we use health and financial information that you give us to assist you in meeting your personal financial goals, while guarding against any real or perceived infringements of your privacy rights. Our policy with respect to personal information is as follows:

- We limit access to information to only those employees who have a business or professional reason for knowing it, and only to nonaffiliated parties as permitted or required by law — for example, federal regulations permit us to share a limited amount of information with brokerage firms in order to transact business on your behalf, and federal and state regulators, in the course of inspecting us, may also have access to your data.

- We maintain a secure physical office with an alarm system that's connected to a central dispatch center. We use a paper shredder to destroy statements and other documents containing sensitive client data before it is discarded.

- Our computerized portfolio accounting system is only connected to the Internet for brief periods, during encrypted downloading, to ensure that your information is not placed at unreasonable risk. If you are one of our clients who has requested that we make your portfolio accounting statement available online, rest assured that no names or account numbers are available on our Internet server, even if anyone were to succeed in accessing your private, password-protected statement area.

- For unaffiliated third parties that require access to your personal information (such as a brokerage firm), we also require strict confidentiality in our agreements with them and expect them to keep this information private.

- We never provide your personally identifiable information to mailing list vendors or solicitors for any purpose.

- Disclosure of private client information is an offense subjecting employees to termination.

- We will maintain your files, with your data, as long as you are a client, and for as long thereafter as may be required by law and prevailing professional standards of behavior. After this required period of retention, all such information will be appropriately destroyed.

- Federal and/or state securities regulators may review our Company records and your personal records as permitted by law.

While none of this is new for us, recent federal legislation, the Graham-Leach-Bliley Act, requires that we communicate our policies in writing to you. It is possible that more questions have been raised than answered. If you have additional questions, please let us know and we will do our best to give you the answers.