PRIVACY NOTICE

Maintaining the trust and confidence of our customer is a high priority. That is why we want you to understand how we protect your privacy when we collect and use information about you, and the steps that we take to safeguard that information. This notice is provided to you on behalf of Centricity Wealth Management, LLC ("Centricity Wealth," "we," "us").

Information We Collect: In connection with providing investment products, financial advice, or other services, we obtain non-public personal information about you, including:

- Information we receive from you on account applications, such as your address, date of birth, Social Security Number, occupation, financial goals, assets and income;
- Information about your investments and transactions with us, non-affiliates and other financial institutions or third parties you hire. This may include specific investments, account numbers, account balances, cash deposits and withdrawals and other financial information.

"Non-public personal information" is non-public information about you that we obtained in connection with providing a financial service to you for personal, family or household purposes. It does not include information available from government records, widely distributed media, or government mandated disclosures.

Third Parties to Whom We May Disclose Information: We will not disclose information regarding you or former customers to anyone except as permitted by law. For example, we are permitted by law to share information about you under the following circumstances:

- To entities that perform services for us or function on our behalf, including financial service providers, such as a clearing broker-dealer, investment company, or insurance company, other investment advisers;
- To third parties who perform services, client resource management, or other parties to help manage your account on our behalf;
- To your attorney, trustee or anyone else who represents you in a fiduciary capacity with your prior consent;
- To our attorneys, accountants, or auditors; and
- To government entities or other third parties in response to subpoenas or other legal processes as required by law or to comply with regulatory inquiries.

Centricity Wealth does not provide your personally identifiable information to direct marketers or solicitors for any purpose.

Former Customers: We will continue to adhere to the privacy practices described in this notice when you become a former customer. You become a former customer when you close all your accounts with us, or your investment management agreement is terminated.

We will maintain personal identifiable information about you during the time you are a customer, and for any time thereafter that we are required to maintain such records by federal and state securities laws. After this required period of record retention, we may destroy that information.

Our Security Policy: We restrict access to nonpublic personal information about you to those employees who need to know that information to provide products or services to you and perform their respective duties. We maintain physical, electronic, and procedural security measures to safeguard confidential customer information.

All employees are trained and required to safeguard this information. We continue to evaluate our efforts to protect non-public personal information.

Changes to This Privacy Policy: We reserve the right to change our privacy policies and procedures, at any time without prior notice. However, if we make any substantial changes in the way we use or disseminate confidential information, we will notify you if you remain an active customer.

How to Contact Us: If you have any questions concerning this Privacy Policy, please contact us at: Centricity Wealth Management, LLC, 515 Executive Campus Drive, Suite 100, Westerville, Ohio; (614) 392-5155.

This Privacy Notice was last updated June 27, 2024.