

Infinitus Wealth Management LLC

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PRIVACY NOTICE

Our Commitment to You

Infinitus Wealth Management LLC ("Infinitus," "we," or "us") is a registered investment adviser. We value the trust our clients place in us and are committed to protecting the privacy and security of your personal information. This notice explains what information we collect, how we use it, when we share it, and how we protect it. It applies to current and former clients.

Information We Collect

To open and service your accounts, meet our legal and regulatory obligations, and provide you with investment advice, we collect nonpublic personal information from the following sources:

- Information you provide to us directly, such as on our advisory agreement, account applications, financial planning questionnaires, our website forms, and in conversations with us. This may include your name, address, email, phone number, date of birth, Social Security number, employment information, income, assets, net worth, investment objectives, and risk tolerance.
- Information about your transactions and accounts with us and with our custodian, such as account balances, holdings, trading history, and billing history.
- Information from third parties you authorize, such as a prior advisor or custodian transferring your accounts, your employer or retirement plan sponsor, your attorney or accountant, and identity-verification or consumer-reporting services used to confirm your identity as required by law.

How We Use Your Information

We use your information to manage your portfolio, process transactions, communicate with you about your accounts, provide financial planning, calculate and bill advisory fees, verify your identity, and comply with applicable securities laws, anti-money-laundering requirements, and regulatory examinations.

Information We Share

We do not sell your personal information. We do not share your nonpublic personal information with any company for its own marketing purposes, and we do not share it with affiliated companies. We share your information only as necessary to serve you and as permitted or required by law, including with:

- **Our custodian**, which holds your assets and executes transactions in your accounts.
- **Service providers** that help us operate the firm, such as portfolio reporting, billing, financial planning, client relationship management, document storage, and electronic communication and archiving providers. These providers are permitted to use your information only to perform services for us and are required to keep it confidential.
- **Professionals you authorize**, such as your attorney, accountant, or other advisors, when you ask us to coordinate with them.
- **Regulators, auditors, and legal authorities** when required by law, regulation, subpoena, or examination, to protect against fraud, or to enforce our agreements.
- **A successor firm** in connection with a proposed or actual sale, merger, or transfer of all or part of our business, subject to the same confidentiality obligations.

Because we share information only under the exceptions permitted by federal privacy law, there is no sharing for you to opt out of. If our practices ever change in a way that would give you a right to opt out, we will notify you and explain how to exercise that right before the change takes effect.

How We Protect Your Information

We maintain a written information security program with administrative, technical, and physical safeguards designed to protect the confidentiality, integrity, and availability of your information. These safeguards include:

- Limiting access to your information to personnel who need it to serve you.
- Multi-factor authentication and strong access controls on the systems that hold client data.
- Encryption of client data in transit and on portable devices.
- Review of the privacy and security practices of the service providers that handle your information.
- Secure retention and disposal of records in accordance with regulatory recordkeeping requirements.
- Review of our security program no less than annually.

If we learn that your personal information has been accessed or used without authorization in a way that creates a risk of harm to you, we will investigate promptly and notify you and the appropriate regulators as required by law.

Former Clients

If you close your accounts or your relationship with us ends, we will continue to treat your information as described in this notice for as long as we retain it. We retain records only as long as required by applicable securities regulations and our record-retention policy, after which they are securely disposed of.

Online Privacy

Our website may use cookies and standard analytics tools to understand how visitors use the site. Information you submit through our website forms is handled under this notice. We do not sell or share website visitor data for third-party marketing.

Changes to This Notice

We provide this notice when you become a client and at least annually thereafter, unless the law permits us to provide it less frequently. We may update this notice from time to time, and we will provide you with a revised notice before any change that affects how we share your information.

Questions

You do not need to contact us to receive these protections; they apply automatically to all current and former clients. If you have questions about this notice or how we handle your information, contact Erik Roberts, Chief Compliance Officer, at (615) 669-5575, erik.roberts@infinituswealth.com, or Infinitus Wealth Management LLC, 55 Music Square E, Suite B, Nashville, TN 37203.