

**FACTS****WHAT DOES LWM ADVISORY SERVICES, 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.
<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 Drivers License number</li> <li>■ Financial Information and Investment Objectives</li> <li>■ Account Balance and Transaction History</li> </ul> <p>When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p>
<b>How?</b>	All financial companies need to share <b>customers'</b> personal information to run their everyday business. In the section below, we list the reasons financial companies can share their <b>customers'</b> personal information; the reasons <b>LWM Advisory Services</b> chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does LWM Advisory Services, LLC 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	No
<b>For joint marketing with other financial companies</b>	No	No
<b>For our affiliates' everyday business purposes—</b> information about your transactions and experiences	Yes	No
<b>For our affiliates' everyday business purposes—</b> information about your creditworthiness	No	Not Shared
<b>For nonaffiliates to market to you</b>	No	Not Shared

<b>Questions?</b>	Call 954-474-7100 or Email <a href="mailto:info@lwmfl.com">info@lwmfl.com</a>
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## Who we are

Who is providing this notice?

LWM Advisory Services, LLC

## What we do

How does **LWM Advisory Services** 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 **LWM Advisory Services** collect my personal information?

We collect your personal information, for example, when you

- seek investment advice or open accounts
- make securities trades or make withdrawals or deposits
- enter into an investment advisory agreement

Why can't I limit all sharing?

Federal law gives you the right to limit only

- sharing for affiliates' everyday business purposes—information about your creditworthiness
- affiliates from using your information to market to you
- sharing for nonaffiliates to market to you

State laws and individual companies may give you additional rights to limit sharing.

## Definitions

**Affiliates**

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- *Legacy Wealth Management, Inc., Legacy Retirement Plan Advisors, LWM Miami, LLC, LWM, LLC, and Legacy Wealth, LLC*

**Nonaffiliates**

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- *LWM Advisory Services, LLC does not share personal information with nonaffiliates to market to you.*

**Joint marketing**

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- *LWM Advisory Services, LLC does not have any joint marketing agreements with any nonaffiliated financial companies.*

## Other important information

We may share your information with broker-dealer firms having regulatory requirements to supervise certain of our activities.

If your financial advisor ("FA") ends his or her affiliation with our firm and joins a non-affiliated firm, your FA may be permitted to retain copies of your nonpublic personal information to assist in transferring your account to his or her new firm so as to provide investment services to you at the FA's new firm. If you do not want us to share your nonpublic personal information with your departing FA and his or her new firm, you may contact us at 954-474-7100.

For clients residing in California, we limit sharing of nonpublic personal information to the extent required by state law.