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PRIVACY NOTICE

Our Commitment to Your Privacy

At Shelter Wealth Strategies, LLC, we are committed to safeguarding the confidentiality and privacy of nonpublic personal information about our current and former clients. This privacy notice describes the types of nonpublic personal information we collect about you and the sources through which we obtain this information, the purposes for which we obtain and use your nonpublic personal information, and the policies and procedures we have implemented to protect the privacy of your nonpublic personal information.

How We Protect Your Nonpublic Personal Information

Protecting your nonpublic personal information is an important priority at Shelter Wealth Strategies, LLC. Accordingly, we have implemented policies and procedures designed to safeguard your nonpublic personal information, such as your tax identification number, account and investment history, account numbers, account balances and nonpublic contact information, from unauthorized access or use. Pursuant to these policies and procedures, we maintain various physical, technological, and administrative safeguards to protect the security and confidentiality of your nonpublic personal information, and we adapt these safeguards to respond to evolving technological and other standards.

We disclose nonpublic personal information about you to nonaffiliated third parties, such as custodians, brokers, auditors, accountants, and systems and administrative service providers, in connection with the wealth management and other services we provide to you or on your behalf. When we provide nonpublic personal information about you to nonaffiliated third parties for these purposes, we expect them to safeguard your nonpublic personal information, use your nonpublic personal information only for the intended purposes and otherwise abide by applicable law. Otherwise, we do not disclose nonpublic personal information about you to nonaffiliated firms, organizations or individuals except as authorized by you or your representatives or as required or permitted by law.

How We Obtain Your Nonpublic Personal Information

We collect nonpublic personal information about you from various sources, including documents, data gathering forms and other information that you or your representatives, custodians, attorneys, accountants, systems and administrative service providers, or similar parties provide to us, communications that we have with you or your representatives, custodians, attorneys, accountants, systems and administrative service providers, or similar parties, and documents and other information related to your investments or account experience with us.

Please do not hesitate to contact our Chief Compliance Officer at (713) 620-8500 if you have any questions regarding this Privacy Notice or the measures we have implemented to protect the privacy of your nonpublic personal information.