

Freedom Wealth Advisors, LLC

Privacy Policy

Reviewed: February 21, 2026

Our Commitment to You

Freedom Wealth Advisors, LLC (“Freedom Wealth”) is committed to protecting your personal information as your Investment Advisor. We value the trust you place in us and make every effort to ensure your information is used appropriately for managing or servicing your account. The security and confidentiality of your data is a priority, and we only use it for legitimate business purposes. Our relationship with you is our most important asset and we strive to maintain your trust at all times.

We do not sell your non-public personal information to anyone. Freedom Wealth also does not share this information with others except for legitimate business purposes related to the service and management of your account.

The details of our approach to privacy, including how your personal non-public information is collected and used, are set forth in this privacy policy.

The Information We Collect About You

You typically provide personal information when completing paperwork to become our client. This information may include:

- Name and address
- Assets
- E-mail address
- Income
- Phone number
- Account balance
- Social security or taxpayer identification number
- Investment activity
- Accounts at other institutions

In addition, we may collect non-public information about you from the following sources:

- Information on Brokerage Agreements, Managed Account Agreements, and other Subscription and Account Opening Documents
- Information gathered during the establishment of a customer relationship, including applications, forms, and questionnaires
- Information about your transactions with us or others

Information About You That Freedom Wealth Shares

Freedom Wealth works to provide products and services that benefit our customers. We may share non-public personal information with non-affiliated third parties, such as brokers and custodians, when necessary to provide agreed services and products to you, in accordance with applicable law. We may also disclose non-public personal information to other financial institutions with whom we have made joint business arrangements for proper business purposes related to the management or servicing of your account. Additionally, your non-public personal information may be disclosed to you, your authorized agent or representative, regulators to satisfy Freedom Wealth’s regulatory obligations, or as required or permitted by law. We may also disclose your information to companies we hire to help administer our business. Such companies are contractually obligated to maintain strict confidentiality and are not permitted to use your personal information for their own purposes. Their use of your information is strictly limited to the performance of the specific service we have requested.

To repeat, we do not sell your non-public personal information to anyone.

Information About Former Clients

Freedom Wealth does not disclose, and does not intend to disclose, non-public personal information to non-affiliated third parties with respect to persons who are no longer our clients.

Confidentiality and Security

Our employees and all access persons are instructed about the importance of respecting the confidentiality of our customers' non-public personal information. We maintain physical, procedural, and electronic safeguards designed to protect your information from unauthorized access.

We'll Keep You Informed

We will send you notice of our privacy policy annually for as long as you maintain an ongoing relationship with us. Periodically, we may revise our privacy policy and will provide you with a revised policy if the changes materially alter the previous privacy policy. We will not revise our privacy policy to allow sharing of non-public personal information beyond what is described in this notice unless we first notify you and provide you with an opportunity to prevent such sharing. You may obtain a copy of our current privacy policy by contacting us at (816) 820-7900.