



## **Our Promise**

You have entrusted Wisdom Index Advisors with very important, nonpublic information. This personal and financial data is yours; therefore, it should remain private. We will not sell or share, for marketing purposes, any client, former client or prospective client information that we collect. We will use your non-public information only to complete transactions or services that you request.

## **Information We Collect**

To provide advisory services, we will need information including name and address, social security or tax identification number, date of birth, assets, income, account balances, investment history, account information, important relationships, financial goals and values and risk tolerance information. We may receive information about you that you authorize third parties to provide to us. We also may obtain personal information from third parties to verify your identity, to prevent fraud, comply with legal or regulatory obligations, and to provide requested advisory services.

## **Information We Disclose**

We are permitted by law to disclose non-public information about you to unaffiliated third-parties in certain circumstances. We could disclose your information to individuals or entities not affiliated with our firm, including, but not limited to, certain service providers (such as the custodian that holds your investment account, third-party investment advisers, or software or web-based application providers) as necessary to service your accounts, to your authorized representative or power of attorney, or otherwise permitted to do so in accordance with the parameters of applicable federal or state privacy regulations.

Because we share non-public information solely to service your accounts, you cannot opt out of allowing us to share your information. In the event we have a change to our business practices that allow nonpublic information to be shared with other third-parties, our Privacy Policy will be amended to allow you the opportunity to opt-out of such disclosure.

Mobile Opt in, SMS Consent, and phone numbers collected for SMS communication purposes will not be shared with any third party and affiliates for marketing purposes. Further, SMS communications are used by our office for appointment scheduling and appointment reminders as well as for follow-ups if requested by the client. The frequency of SMS communications may vary, and a client may Opt-out at any time by notifying our office. Standard message and data rates may apply. We may use artificial intelligence ("AI") technologies to assist our personnel with administrative, analytical, compliance, and communication functions. AI tools are used under appropriate human supervision and do not replace the judgment of our investment professionals. We maintain policies and procedures designed to protect confidential client information when using these technologies. We remain committed to transparency, data privacy, and compliance with all applicable laws and regulations governing the advisory industry.

Safeguards We maintain administrative, technical, and physical safeguards reasonably designed to protect the security, confidentiality, and integrity of your personal information and to protect against anticipated threats or unauthorized access consistent with applicable federal law. We require firms that provide us with services for your account to execute contracts providing confidential treatment of your information. Our Custodian and Client Portal(s) use data encryption technologies including user names and passwords to provide a high-level of security and privacy when accessing your account information on-line.

## **Other Advisors**

To benefit from Walking in Wisdom®, our Wealth Management process, we may communicate with your attorney, accountant, insurance professional, or other financial professionals to coordinate the advisory services we provide. We will obtain your authorization to make these communications.

## **Updates**

We will provide our privacy notice at the start of our relationship with you and thereafter as required by applicable law, including whenever our privacy practices materially change. Should you have any concerns, please call us at (972) 931-0063.

## **Disclosures**

You may obtain additional information regarding our firm, our service model, business practices, and relationships with others from our Form CRS and Form ADV Part 2A. If you would like a copy of these documents, please call (972) 931-0063. You may also receive the most recent disclosure documents from the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).