

## **PRIVACY POLICY FOR CUSTOMERS OF WEDGEWOOD PARTNERS, INC.**

Wedgewood recognizes that it has an obligation to you to keep information about you secure and confidential.

Wedgewood maintains physical, electronic, and procedural practices to safeguard your personal information. We evaluate new technology for protecting information and upgrade our systems when appropriate.

The only time Wedgewood will release information to another party is when you specifically authorize such release, as directed by competent legal authority, (i.e. Subpoena), or regulatory body, (S.E.C., F.I.N.R.A.), or as necessary for everyday business use to process your transactions and maintain your account(s). Your authorization to release information may be in the form of a Deposit Verification, often required for the purchase of property; a Power of Attorney, should you grant such power; or information you specifically direct us to provide to a tax preparation firm, Law Firm, etc. Without your consent, an order from competent legal and/or regulatory authorities as described above, or for everyday business use as described above, information will not be released.

Under the USA PATRIOT ACT, Wedgewood will respond to section 314(a) information requests. This section authorizes law enforcement to request information about suspected money laundering and terrorist financing.

We must collect a certain amount of information to provide customer service, offer new products or services, administer our products, and fulfill legal and regulatory requirements. Specific language and examples may not apply to all customers and the information we collect varies accordingly.

Examples include:

- account information, such as name, address, date of birth, Social Security number, gender, marital status, assets, income and investment option elections;
- information about your relationship with us, such as products or services purchased and account balances;
- information provided by your accountant or attorney;
- information from visitors to our Web sites, such as that provided through online account access, site visit data, and online information collecting devices known as "cookies". Cookies enable the site to "remember" who you are so you can navigate the site easier. They also permit you to access secured information. We do not record personal or sensitive information in our cookies.

We will continue to provide this notice at the frequency required by law and will notify customers of any modification.

We will continue to follow the policies set forth in this notice even when a customer relationship no longer exists.

This notice is being provided to you in accordance with the Federal Financial Privacy Law. As required by law, Wedgewood will provide you with an update of this policy annually. If you have any questions, please contact us at (314) 567-6407 or [bthomas@wedgewood-partners.com](mailto:bthomas@wedgewood-partners.com)

Updated Reviewed 3/2025