Matt Miner, MBA, CFP®
Miner Wealth Management
4801 Glenwood Ave Ste 200-05
Raleigh, NC 27612
+1 (919) 210-4773
Minerwealth.com

Customer Privacy Policy Notice

The information contained in this section will also be disclosed in Miner Wealth Management Privacy Policy Statement. This statement will be provided to all clients in accordance with the rules and regulations of the Gramm-Leach-Bliley Act of 1999.

As a registered investment advisor, Miner Wealth Management, LLC and its investment adviser representatives will gather and develop personal information regarding our clients. This information will be gathered and developed by us for the following purposes:

- To determine the client's financial goals and objectives
- To determine the level of advisory services needed and desired by the client
- To provide the client with specific recommendations regarding advisory services
- To provide the client with specific recommendations regarding financial products
- To provide ongoing support and recommendations regarding financial products held in the client's account

Client information that Miner Wealth Management, LLC will collect may include, but not be limited to the following:

- Information received from clients on financial inventories through consultations with its representatives. This information may include personal and household information such as income, spending habits, investment objectives, financial goals, statements of account and other records concerning the clients' financial conditions and assets, together with information concerning employee benefits and retirement plan interests, wills, trusts, mortgages and tax returns.
- Information developed as part of financial plans, analyses or investment advisory services.
- Information concerning investment advisory account transactions, such as wrap account transactions.
- Information about clients' financial products and services transactions with Miner Wealth Management, LLC.

When a client account is closed, Miner Wealth Management, LLC will continue to keep all client information confidential in accordance with the principles stated in its privacy policy.

MINER WEALTH MANAGEMENT

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A copy of the Privacy Policy Notice will be delivered to all clients in writing by at least one of the following methods:

- By hand delivering a copy to the client
- Mailing a copy to the client's address on record
- If business is conducted electronically, a notice may be posted on an electronic site as long as the client acknowledges receipt of the Privacy Policy Notice prior to the client obtaining any services or products from Miner Wealth Management, LLC

A copy of the Privacy Policy Notice will be provided to the client no later than the time a client establishes a relationship with Miner Wealth Management, LLC, unless this situation would cause a delay in the client obtaining services and the client agrees to accept the notice at a later date. When this situation applies, a copy of the Privacy Policy Statement will be delivered to the client within a reasonable time period following the transaction.

Any time a change is made to the Privacy Policy, the statement to clients will be revised. The revised statement will be given to all affected clients prior to any disclosure of information. In addition, Miner Wealth Management, LLC will provide a copy of its Privacy Policy Statement to all current and existing clients at least annually.