Foster Strategic Wealth Partners, LLC
Privacy Policy
Effective Date: December 18, 2025

At **Foster Strategic Wealth Partners, LLC** (“we,” “our,” or “the Firm”), protecting the privacy and confidentiality of our clients’ information is a top priority. This Privacy Policy explains the types of nonpublic personal information we collect, how we use and protect it, and your rights as a client. This policy is provided in accordance with Massachusetts law and SEC requirements.

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1. Information We Collect

We may collect the following nonpublic personal information from clients in the course of providing advisory services:

- Personal identifying information (e.g., name, address, Social Security or Tax ID, date of birth).
- Financial account information, income, assets, and liabilities.
- Investment goals, risk tolerance, and financial preferences.
- Transaction history, account statements, and other financial data.

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2. How We Use Your Information

We use client information to provide comprehensive financial advisory services, including:

- Developing and managing investment portfolios.
- Financial planning and tax-related guidance.
- Billing and account management.
- Compliance with regulatory obligations.
- Communication regarding your accounts, services, or market updates.

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3. Sharing of Information

We do **not** sell your personal information. We share client information only as permitted or required by law and only when necessary to service your account:

- With custodians or other service providers necessary to manage your accounts.
- With consultants or service providers engaged to assist in servicing your account.
- As required by law, regulation, or legal process.

All third parties are required to maintain confidentiality and use your information solely to provide services on our behalf.

We do not share client information with non-affiliated third parties for marketing or other unrelated purposes. If the Firm ever wishes to share your information for any purpose not described above, we will obtain your written consent in advance, as required under Massachusetts law.

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4. Safeguards

We maintain strict safeguards to protect your information, including:

- Secure electronic storage with encryption and access controls.
- Physical security measures for paper records.
- Employee training and internal policies limiting access to authorized personnel only.

In the event that client information is compromised as a result of a security incident, FSWP will take appropriate steps to investigate, mitigate harm, and notify affected clients and applicable parties consistent with applicable law.

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5. Business Continuity and Emergency Contact

In the event of the permanent incapacitation or death of the adviser, Foster Strategic Wealth Partners, LLC may share limited client information with the Firm's designated emergency contact solely for the purpose of notifying clients, coordinating account continuity, and facilitating the orderly transition of records.

The information shared will be limited to client names, contact information, and custodian details. No account login credentials, trading authority, or access to client assets will be provided. Any such sharing will be conducted in accordance with applicable privacy and regulatory requirements.

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6. Client Rights

You have the right to:

- Request access to the information we maintain about you.
- Request corrections to inaccurate or incomplete information.
- Approve or decline any sharing of your information with non-affiliated third parties for purposes not necessary to service your account.

To exercise these rights, please contact us at cindy@fosterswp.com or 508-404-6761.

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7. Electronic Communications

We may communicate with clients by email. Clients should be aware that email is **not fully secure**, and there is a risk of interception. By providing your email, you consent to electronic communications from us. Clients may request that sensitive documents be transmitted using secure delivery methods instead of regular email.

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8. Policy Updates

We may update this Privacy Policy from time to time. Clients will be notified of any material changes in writing, either by mail or electronic communication.

Contact

If you have any questions regarding this Privacy Policy or our privacy practices, please contact:

Cindy Foster, EA
Managing Member and Investment Adviser Representative
Foster Strategic Wealth Partners, LLC
508-404-6761 | Cindy@Fosterswp.com

Acknowledgment of Receipt

I acknowledge that I have received and read the Foster Strategic Wealth Partners, LLC Privacy Policy and understand how my personal and financial information is collected, used, shared, and protected.

Client Name: ___________________________

Client Signature: ________________________

Date: ________________________________

Advisor Name: __________________________

Advisor Signature: _______________________

☐ I consent to the Firm sharing my information only as described in this Privacy Policy.

Clients may revoke consent at any time by notifying the Firm in writing.