

## Iliad Wealth Solutions, LLC

### PRIVACY POLICY

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An important part of the relationship we have with our clients is the information they share with us. We want each client to know how we treat their private information. We keep personal information such as Social Security Numbers and account balances confidential. We take steps to safeguard this data from anyone who should not have access to it. We do not sell this information to anyone.

In dealing with Iliad Wealth Solutions, LLC, clients can expect that we will take the steps outlined below to keep all their information confidential and secure.

### OUR PRIVACY POLICY

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In providing financial services and products to our clients, we collect certain non-public information about them. Our policy is to keep this information confidential and strictly safeguarded, and to use or disclose it only as needed to provide services to our clients, or as permitted by law. Protecting your privacy is important to us.

### INFORMATION WE COLLECT

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The non-public personal information we have about clients includes what they give us when opening an account or communicating with us. This could include:

- Name and address
- Social Security Number
- Investment objectives and experience
- Financial circumstances
- Employment history
- Account balance and account transactions

### HOW WE SHARE YOUR PERSONAL INFORMATION

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We do not sell personal client information to anyone.

**Affiliates.** We may share personal information about you with our affiliated companies for everyday business purposes, however, our affiliated companies are not permitted to use this information to market their products or services to you.

We do not disclose personal information about our clients to non-affiliated third parties, without expressed written consent. We may disclose anonymous information that cannot be linked to an individual client on occasion, but only to companies that we hire to help us provide products and services to our clients, or as required by law, or as authorized by the client personally as other described in this Privacy Policy.

**Service Providers.** Companies and individuals that provide services on our behalf or help us operate the Service or our business (such as IT, hosting, investment trading, customer relationship management and support, print and mail fulfillment, data management, email delivery, etc.).

**Service-Related Third Parties.** Brokers, custodians, administrators, transfer agents, investment funds

and their respective managed and other non-affiliated third parties as necessary to provide service.

## HOW INFORMATION IS USED

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We use your personal information for the following purposes:

**Service Delivery.** We use your personal information to provide, operate, and improve the Service; execute your transactions; provide support for the service; and respond to your inquiries, questions and feedback.

**Compliance and Operations.** We may use your personal information to: comply with applicable laws, lawful requests, and legal process, such as to respond to subpoenas or requests from government authorities; protect our, your or others' rights, privacy, safety or property (including by making and defending legal claims); audit our internal processes for compliance with legal and contractual requirements and internal policies; and prevent, identify, investigate and deter fraudulent, harmful, unauthorized, unethical or illegal activity, including cyberattacks and identity theft.

## HOW INFORMATION IS SAFEGUARDED

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We have procedures in place that we believe are reasonably designed to protect the security and confidentiality of client information. These include confidentiality agreements with companies we hire to help us provide services to clients, password-protected user access to our computer files, and strict confidentiality policies that apply to all Iliad Wealth Solutions, LLC., personnel, vendors, and contractors.

## YOUR DATA CHOICES

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You have the following choices with respect to your personal information:

**Decline to provide information.** We need to collect personal information to provide certain services. If you do not provide the information requested, we may not be able to provide those services.

**How to contact us.** You can reach us in the following ways:

Mail: 6991 E. Camelback Road Suite D300, Scottsdale AZ 85251

Email: [josh@iliadwealth.com](mailto:josh@iliadwealth.com)

Phone: 412-310-3207