ClearView Private Wealth LLC

Privacy Policy Notice

Effective Date: November 24, 2025 **CRD #:** 338264

Our Commitment to Your Privacy

ClearView Private Wealth LLC ("we," "our," or "us") is committed to safeguarding the confidential information of our clients. We hold all personal information provided to us in the strictest confidence. This notice is being provided to you in accordance with the U.S. Securities and Exchange Commission's Regulation S-P, which governs the privacy of consumer financial information.

The Information We Collect About You

We collect nonpublic personal information about you from the following sources to provide you with investment advisory services:

- **Information from you:** We collect information you provide to us on applications, questionnaires, and other forms, such as your name, address, Social Security number, assets, income, and investment objectives.
- **Information about your transactions:** We collect information about your transactions with us, our affiliates, or others, such as your account balances and trading activity.
- **Information from other sources:** We may receive information from other third-party sources, such as your custodian.

How We Handle Your Personal Information

We do not sell your personal information to anyone. We will not disclose your nonpublic personal information to any third parties, except in the following limited circumstances:

- **To service your account:** We may share information with unaffiliated third parties who assist us in servicing your account and conducting our business, such as our qualified custodian (e.g.,Charles Schwab).
- **As required by law:** We may disclose information as required by federal, state, or local law, or in response to a subpoena, court order, or other legal process.
- **As authorized by you:** We will not share your information with any other party unless you have explicitly authorized us to do so.

How We Protect Your Personal Information

We maintain physical, electronic, and procedural safeguards that comply with federal standards to protect your nonpublic personal information.

- Access to your information is restricted to those employees who have a legitimate business need for the information in order to provide services to you.
- We maintain a secure office environment, including locked files and secure data storage, to ensure your information is not placed at unreasonable risk.
- Our electronic systems are protected by passwords and other security measures such as encryption and multi-factor authentication to safeguard your data.

Contact Us

If you have any questions about our privacy policy, please do not hesitate to contact us.

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