PERSPECTIVE
WEALTH MANAGEMENT

Client Privacy Notice

This notice is provided to you on behalf of **The Junk Investment Group, LLC,** doing business as **Perspective Wealth Management**. Maintaining the trust and confidence of clients is a high priority. That is why we want you to understand how we protect your privacy when we collect and use your information, and the steps that we take to safeguard that information.

Information Collected:
In connection with providing investment products, financial advice or other services, we obtain non-public personal information about you, including:

- Information received from you on account applications;
- Information received from credit or service bureaus or other third parties; and
- Information about your transactions with us or others, including your financial advisor.

Information Disclosed:
We do not disclose information regarding you, or your accounts with us, except under the following circumstances:

- To your authorized financial advisor and his or her manager;
- To establish or maintain an account with an unaffiliated third party, such as a clearing broker providing services to clients and/or us;
- To government entities or other third parties in response to subpoenas or other legal process as required by law;
- If applicable, to our parent companies or their affiliates, to the extent permitted by law;
- To other advisors as authorized by you.

SMS Terms & Conditions

- Program Overview: By opting in, you will receive messages from Perspective Wealth Management, including information about appointment confirmation details.
- Message Frequency: The message frequency will vary.
- Opt-Out Instructions: To stop receiving messages, you may unsubscribe at any time by replying with the keyword STOP. After sending this message, you will receive a confirmation SMS, and no further messages will be sent to you.
- Help: If you need assistance with the SMS program, reply with “HELP” or contact us directly at (410) 584-8100
- Carrier Liability: Please note that carriers are not responsible for delayed or undelivered messages. Cost: Standard message and data rates may apply for messages sent to and received from us. For questions about your text or data plan, please contact your wireless provider.
- Privacy: All details about how we handle your information is included within in this Privacy Policy.
- Mobile information will not be shared with third parties/affiliates for marketing/promotional purposes. All the above categories exclude text messaging originator opt-in data and consent; this information will not be shared with or obtained from any third parties.

Security Policy:
Only those individuals who need it to perform their jobs are authorized to have access to your confidential information. We maintain physical, electronic and procedural security measures that comply with applicable state and federal regulations to safeguard confidential client information. **Closed or Inactive Accounts:**
If you decide to close your account(s) or become an inactive customer, we adhere to the privacy policies and practices as described in this notice.

Complaint Notification:
Please direct complaints to Perspective Wealth Management, 307 International Circle, Suite 540, Hunt Valley, MD 21030, (410) 584-8100.

Changes to This Privacy Policy:
If there are any substantial changes in the way we use or disseminate confidential information, Perspective Wealth Management will notify you. If you have any questions concerning this Policy, please write to Perspective Wealth Management, 307 International Circle, Suite 540, Hunt Valley, MD 21030.