



PRIVACY POLICY

Dated March 29, 2023

Flourish Wealth Management is committed to client confidentiality and to protect your privacy. The following information is provided, as required by law, to help you understand our privacy policy and how we will handle and maintain confidential personal information as we fulfill our obligations to protect your privacy. "Personal information" refers to the nonpublic financial information obtained by Flourish Wealth Management in connection with carrying out our services.

Information We Collect

Flourish Wealth Management collects personal information as part of our relationship to you, to provide client services and fulfill legal and regulatory requirements. The type of information Flourish Wealth Management collects may include:

Information Flourish Wealth Management receives from you on forms (such as name, address, Social Security number, profile documents, assets and income); Information you provide Flourish Wealth Management directly about your personal finances or personal circumstances or which Flourish Wealth Management may receive from brokerage statements or other information you authorize Flourish Wealth Management to receive.

Information Disclosed In Administering Products and Services Flourish Wealth Management will not disclose personal information about current or former clients to non-affiliated third parties except as permitted or required by law. Flourish Wealth Management does not sell any personal information about you to any third party. Flourish Wealth Management will not disclose personal information without your authorization, except as required or permitted by law.

Procedures to Protect Confidentiality and Security of Your Personal Information Flourish Wealth Management has procedures in place that limit access to personal information to those employees who need to know such information in order to perform business services. In addition, Flourish Wealth Management maintains physical, electronic and procedural safeguards to guard your nonpublic personal information.

Changes to Our Privacy Policy In the event there were to be a material change to our privacy policy regarding how we use your confidential information, we will provide written notice to you. Where applicable, you would be given an opportunity to limit or opt-out of such disclosure arrangements.

Flourish Wealth Management will update its policy and procedures when necessary to ensure that your privacy is maintained and that Flourish Wealth Management conducts business in a way that fulfills our commitment to you. If Flourish Wealth Management makes any material changes in its privacy policy, we will make that information available to clients through our Web site and/or other communications.