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Pensacola, FL, 32502

April 19, 2024

## Privacy Policy Notice

Kingsman Wealth Management Inc. (“Kingsman Wealth”) is an investment advisory firm registered with the SEC that provides investment advisory services and operates [www.kingsmanwealth.com](http://www.kingsmanwealth.com), which describes our services.

This document is intended to inform prospective clients and website visitors of our policies concerning the collection, use, sharing, and disclosure of Personal Information of anyone using our services.

By using our services, you agree to the collection and use of information within the terms of this policy. The Personal Information collected by the firm is used to assist Kingsman Wealth in providing investment advisory services. The firm will not sell your information or use or share your information with anyone except as described in this Privacy Policy.

When you are no longer our client, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.

## Information Collection and Use

Kingsman Wealth requires you to provide the firm with certain personally identifiable information including, but not limited to, your name, phone number, and postal address, date of birth and social security number or tax ID. This information is used to contact or identify you.

For business purposes— such as to process your transactions, maintain your account(s), or respond to court orders and legal investigations, the firm will collect, and will share as necessary your Social Security number, Tax ID, annual income, investment objectives and goals, account balances, and credit information. We do not sell your personal information and will only share your personally identifiable information, as necessary to service your account and deliver contracted services to you, or as required by law.

The federal government and some states allow you to limit this collection and sharing. Such limits may prevent our providing necessary services. For more information, or to limit information sharing, contact us at the phone number or email address listed below for more information.

## Information Shared with Third Parties

Kingsman Wealth will share your personal information with non-affiliated financial institutions or third-party service providers with whom we may have arrangements, such as custodians, brokers, administrators, and other service providers or individuals due to the following reasons:

- to facilitate our investment advisory services;
- to provide the investment advisory services on our behalf;
- to perform operational-related services;
- to assist us in monitoring, analyzing your financial situation and assist with reporting and reviews;
- to enable these service providers to provide business services to us such as accounting, legal, audit, consulting, or other professional services, and analyzing how our investment advisory services are used; or
- pursuant to law, rules, regulations, standard security industry practices, in connection with a subpoena, discovery request, or other legal/regulatory process compelling the sharing of information.

These third parties will have access to your Personal Information to perform the tasks assigned to them on our behalf. They are not allowed to disclose or use the information for any other purpose. Kingsman Wealth requires that all third parties and business partners with access to our client sensitive personal information protect our client's personal information and sign confidentiality agreements. Employees may access your information only when it is appropriate to do so, such as to administer products or services. Failure to adhere to our established privacy and security policies may subject employees to disciplinary action, including termination of employment.

We maintain commercially reasonable physical, electronic, and procedural safeguards to protect our client's nonpublic personal information. Employees and agents are trained on their responsibilities to protect our client's personal information and are required to use secure passwords and encryption to store and transmit client data. Our technology vendors provide security and access control over personal information and have policies over the transmission of data.

## Changes to Our Privacy Policy

Kingsman Wealth may update our Privacy Policy at any time, and we advise you to review the website periodically for any changes. The firm will notify you of any changes and post the new Privacy Policy on our website. All changes are effective immediately after they are posted on our web page.

## Questions

If you have any questions or suggestions about our Privacy Policy, please feel free to contact us by phone at (850) 565-3780 or by email at [katie@kingsmanwealth.com](mailto:katie@kingsmanwealth.com).