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BUSH WEALTH MANAGEMENT PRIVACY NOTICE

Bush Wealth Management (“Bush Wealth”) maintains physical, electronic, and procedural safeguards that comply with federal standards to protect its clients’ nonpublic personal information (“information”). Through this policy and its underlying procedures, Bush Wealth attempts to secure the confidentiality of customer records and information and protect against anticipated threats or hazards to the security or integrity of customer records and information.

It is the policy of Bush Wealth to restrict access to and/or the sharing of all current and former clients’ information (i.e., information and records pertaining to personal background [including social security number and address], investment objectives, financial situation, financial planning issues, tax information/returns, investment holdings, account numbers, account balances, etc.) to those employees and affiliated/nonaffiliated entities who need to know that information in furtherance of the client’s engagement of Bush Wealth.

Bush Wealth shall disclose, as necessary, the client’s information: (1) to employees of our firm or any company affiliated with our firm; (2) to service providers in order to establish and maintain the client’s accounts and process transactions (i.e., broker-dealer, account custodian, record keeper, proxy management service provider, insurance company, etc.); (3) required to do so by judicial or regulatory process; or (4) otherwise permitted to do so in accordance with applicable federal and/or state privacy regulations. We will also receive nonpublic personal information from some or all of the entities listed above.

However, Bush Wealth does not, and shall not, disclose or share information with any affiliated or unaffiliated persons, entities or service providers for marketing or any other purposes or reasons not referenced above.

This policy may change to reflect updates in our practices, procedures, or regulatory requirements concerning the collection and use of clients’ information. As our client, you will receive notifications at least annually and our revisions or changes to this policy will be highlighted in our annual notifications.

ANY QUESTIONS OR CONCERNS: Should you have any questions regarding the above, please contact Courtney Gooding, Chief Compliance Officer, at (229) 247-1474 or via email at courtney@bushwealth.com.