

FACTS	WHAT DOES WEALTH MANAGEMENT SOLUTIONS, LLC DO WITH YOUR PERSONAL INFORMATION?
Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	<p>The types of personal information we collect and share depend on the product or service you have with us. This information may include:</p> <ul style="list-style-type: none"> • Social Security number and income • Credit History, Credit Scores, and Credit Based Insurance Scores • Investment statements and other asset documentation • Financial and estate planning documents • Employment Information <p>When you are no longer our customer, we continue to share your information as described in this Privacy Notice.</p>
How?	All financial companies need to share clients’ personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients’ personal information; the reasons Wealth Management Solutions, LLC (“WMS”) chooses to share; and whether you can limit this sharing.

Reasons WMS can share your personal information	Does WMS share for this reason?	Can you limit this sharing?
For our everyday business purposes— such as to process your transactions, maintain your accounts, respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes— to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	We Don’t Share
For our affiliates’ everyday business purposes— information about your transactions and experiences	No	We Don’t Share
For our affiliates’ everyday business purposes— information about your creditworthiness	No	We Don’t Share
For our affiliates to market to you	No	We Don’t Share
For nonaffiliates to market to you	No	We Don’t Share

Questions?	Call (610)524-7031 or go to www.wmsplan.com .
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Who We Are	
Who is providing this notice?	Wealth Management Solutions, LLC
What We Do	
How does WMS protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with applicable law. These measures include computer safeguards and secured files and buildings.
How does WMS collect my personal information?	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> • Open an account • Develop an investment policy statement • Give us your contact information <p>We may also collect your personal information from others, such as credit bureaus, affiliates, or other companies.</p>
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> • Sharing for affiliates' everyday business purposes—information about your creditworthiness • Affiliates from using your information to market to you • Sharing for nonaffiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing.</p>
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.

Definitions	
Affiliates	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> • <i>WMS does not share with affiliated persons, except as necessary to provide services to you.</i>
Nonaffiliates	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> • <i>WMS does not share with nonaffiliated persons so they can market to you.</i>
Joint Marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> • <i>WMS does not jointly market.</i>