

PRIVACY OF CONSUMER INFORMATION

At LionsBridge Wealth Management, LLC (“we” or “our”), maintaining the trust and confidence of our investors is of paramount importance. We are committed to safeguarding your personal information and providing you with facts and options about how this information may be shared. Please read this notice to learn more about our privacy policies and the options available to you.

This notice replaces all previous statements of our privacy policy, and may be amended at any time. We will provide you with annual reminders of our policies and with revised policies if there are any changes in how we handle your personal information. If you end your relationship with us, we will continue to adhere to the policies and practices described in this notice. If you have any questions about this privacy policy you may contact us by email at carolyn@lbwm.net or call us at 904-562-5194.

Information That We Collect. As part of providing you with our services we obtain nonpublic personal information about you. Such personal information includes your name, address, telephone number, e-mail address, telephone number, Social Security or other identification number, income, assets, financial goals, interests, source of funds, identity, and investment objectives. In addition, such personal information can be characterized in the following ways:

1. **Application Information.** This includes information that you provide to us on applications and through other means. Examples include assets, income, and debt.
2. **Transaction and Experience Information.** This includes information about your transactions and account experience, as well as information about our communications with you. Examples include your account balances, payment history, parties to transactions, and requests for copies of checks and our responses.

Information That We Share. We, along with our affiliates, use or share information in a limited and carefully controlled manner. We do not disclose any nonpublic information about our investors or former investors to anyone, except as permitted by law, unless authorized by you. Instances in which we may be required to share your information include:

- We may use your personal information to verify your identity, including, where applicable, verification in accordance with the USA Patriot Act. We will also use personal information to comply with legal and regulatory requirements, and in accordance with applicable laws, rules, and regulations.
- Disclosure to affiliated companies that provide services necessary to effect a transaction that you request or to service your account such as prime brokers, accountants, banks, attorneys or administrators.
- Disclosure to government agencies, courts, parties to lawsuits, or regulators in response to subpoenas. In such cases, we share only the information that we are required or authorized to share.

Confidentiality and Security. The security of your account information is important to us. Only those persons who need your information to perform their job have access to it. In addition, we maintain physical, electronic and procedural security measures that comply with U.S. regulations to protect your information. Additionally, we require independent contractors and outside companies who work with us to adhere to strict privacy standards through their contracts with us.

Our employees have limited access to your personal information based upon their responsibilities. All employees are instructed to protect the confidentiality of your personal information as described in these policies, which are strictly enforced.

We use technological means (such as backup files, virus detection and eradication software, firewalls, and other computer software and hardware) to protect against unauthorized access or alterations to client data.

The version of this Privacy Policy is effective January 1, 2022. The policies and practices described in this disclosure are subject to change, but we will communicate any significant changes to you as required by applicable law and will provide you with a copy of the latest version of this Policy as required by applicable law. The policies and practices described in this disclosure replace all previous notices or statements regarding this subject.