

# Highline Wealth Partners

## Privacy Policy

Your relationship with Highline Wealth Partners (“Highline”) is based on trust and confidence. Protecting your privacy is very important to us. Our goal is to treat the personal information you furnish us with the utmost respect and in accordance with this Privacy Policy. We request that you carefully read this Privacy Policy. By doing business with Highline you are agreeing to the terms set forth in this Privacy Policy.

This policy describes the types of personally identifiable information (“PII”) we may collect from you or that you may provide, and our practices for collecting, using, maintaining, protecting and disclosing that information. PII includes information such as your name, address, phone number, ZIP code, email address and similar information.

### Personal Information We Collect and How We Collect It

In providing you wealth management services, we collect certain nonpublic personal information about you. Our policy is to keep this information strictly confidential, and to use or disclose it only as needed to provide services to you, or as permitted by law. Our privacy policy applies equally to our former clients, as well as individuals who simply inquire about the services we offer.

The nonpublic personal information we have about you includes what you give us when you open an account, or communicate with us about your account, such as your name, address, social security number, employment information, investment objectives, financial circumstances, account transactions and holdings.

You can call us for general information anonymously or visit us on the internet without telling us who you are or revealing any information about yourself, including your name and email address.

There are times when we may ask you for information about yourself to assist us in meeting your various needs. In these cases, you and your browsing will no longer be anonymous to us. To provide these services, we may need to ask you directly to provide, among other things, your name, physical address, zip code, email address, phone number, and other personal information.

Please note that we do not knowingly solicit information from minors, and we do not knowingly market our products or services to minors.

### How We Use and Share Your Information

We use and may share nonpublic personal information about you only to outside firms that provide necessary services for your account, such as your account custodian or broker-dealer, or as authorized by you or permitted by law. We may use information that we collect about you or that you provide to us, including any personal information, for any purpose including, but not limited to:

- Providing you with materials you have requested
- Contacting you for other financial products

- Personalizing our contact with you
- Operating, providing, improving, and maintaining our website
- Developing new products and services
- Preventing abusive and fraudulent use of our website
- Sending you administrative messages, content and other services and features in which we believe you may be interested
- Any other administrative and internal business purposes permitted by law

## **Protection of Your Information**

We restrict access to nonpublic personal information about you to those persons who need to know it or who are permitted by law to receive it. We use a variety of security measures to protect against the loss, misuse, and alteration of information under our control by maintaining physical, electronic, and procedural safeguards to protect the confidentiality of your information.

Although we make good-faith efforts to maintain the security of such information, we cannot guarantee that it will remain free from unauthorized access, use, disclosure, or alteration. Further, we cannot guarantee that our security measures will prevent unauthorized persons from accessing or obtaining this information. We assume no liability to you or any other party in relation to the unauthorized access, use or alteration of any information provided to us.

## **Notification in the Event of Data Breach**

As previously stated, although we make good-faith efforts to maintain the security of your information, we cannot guarantee that it will remain free from unauthorized access, use, disclosure, or alteration. In the event your personally identifiable information is breached by an unauthorized party, we will comply with applicable laws in notifying you of the breach.

## **Accessing or Correcting Your Information**

You may access the data collected by us about you by sending a request to the address listed below. If you believe that an error has been made in the accuracy of the information collected from you, we will correct such error upon adequate verification of the error and the identity of the person seeking the correction.

If you wish to access, remove, or correct any personally identifying information you have supplied to us or if you have any questions about this Privacy Policy, you may contact us by sending a letter via the U.S. Mail to: Privacy Officer, 15260 Ventura Blvd., Suite 855, Sherman Oaks, CA 91403. Please understand that to protect your privacy and security, we may also need to take reasonable steps to verify your identity before granting access or making corrections.

## **Sharing Information and Consumer Choice**

When you provide information to us, we may share your information, to the extent provided by applicable law, with our affiliated companies and third parties for the purpose of fulfilling your requests as well as offering you other services that may be of interest to you. It is not shared with any third party, unless requested by you or permitted by law. Under no circumstance will we sell your information or transfer your information to any ad network, ad exchange, data broker or other advertising or monetization related service. We may also aggregate statistics that we gather about our customers, sales, traffic patterns and services, and provide these statistics to third

parties; however, when we do, these statistics will not include any personal information that identifies individuals.

### **Opt-Out Provisions**

Highline does not sell clients' nonpublic personal and financial information. Highline does not share nonpublic personal and financial information with affiliated or unaffiliated third parties except under the circumstances noted above. Since sharing under the circumstances noted above is necessary to service client accounts or is mandated by law, there are no allowances made for clients to "opt out".

### **Changes to This Privacy Policy**

We reserve the right to modify or supplement this Privacy Policy statement at any time. If we make any material change, we will update our website to include such changes. A notice that our privacy policy has been updated will be displayed on our website homepage. We ask that you periodically visit our website and this privacy policy to check for any changes.

### **Contact Information**

For questions about this privacy policy and our Firm's privacy practices, contact us at [lisa@highlinewp.com](mailto:lisa@highlinewp.com), or call us at (818) 340-0157.

If you decide to close your account(s) or become an inactive customer, we will adhere to these privacy policies and practices as described. We reserve the right to change this policy at any time and you will be notified if any changes do occur.