

WILKINSON GLOBAL ASSET MANAGEMENT LLC
PRIVACY NOTICE
MARCH 2024

FACTS	WHAT DOES ADVISER Wilkinson Global Asset Management LLC (“WGAM”) DO WITH YOUR PERSONAL INFORMATION?	
WHY?	Financial companies choose how they share your Personal Identifiable Information (PII). 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 can include:</p> <ul style="list-style-type: none"> ▪ Social security number ▪ Driver’s License ▪ Income ▪ Assets ▪ Risk tolerance ▪ Wire transfer instructions ▪ Transaction history ▪ Physical Address ▪ E-mail address ▪ Phone number <p>When you are no longer our customer, we continue to share information about you as described in this notice for business purposes only.</p>	
HOW?	All financial companies need to share customers’ personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers’ personal information; the reasons WGAM chooses to share; and whether you can limit this sharing.	
	Reasons we can share your personal information	Does WGAM Share?
	For our everyday business purposes - such as processing your transactions, maintaining your accounts(s) or responding to court orders and legal investigations.	Yes
	For our marketing purposes - to offer our products and services to you	No
	For joint marketing with other financial companies	No
	For our affiliates' everyday business purposes - information about your transactions and experiences	No
	For our affiliates' everyday business purposes – information about your creditworthiness	No
	For nonaffiliates to market to you	No
	Can you limit this sharing?	No
	QUESTIONS?	Call Charles Wilkinson, Chief Compliance Officer at: 646-751-5505

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WHO WE ARE	
Who is providing this notice?	Wilkinson Global Asset Management LLC.
WHAT WE DO	
How does WGAM protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does WGAM collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ▪ Enter into an investment advisory contract. ▪ Seek financial advice. ▪ Make deposits or withdrawals from your account. ▪ Tell us about your investment or retirement portfolio. ▪ Give us your employment history
Why can't I limit all sharing?	Federal law gives you the right to limit only: <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; State laws (see below) and individual companies may give you additional rights to limit sharing.
<p>The California Consumer Privacy Act (“CCPA”) only applies to residents of the State of California and requires us to make certain additional disclosures and provides California residents with the ability to request additional information about their Personal Identifiable Information (PII). If CCPA applies to you, this section details your rights, how you may exercise them, and what WGAM will do if you exercise your rights.</p> <p>As a resident of California and whose PII is collected and processed by WGAM, you may have the right to:</p> <ul style="list-style-type: none"> ▪ Appoint an authorized agent to exercise your rights on your behalf. ▪ Request that we disclose the types, the categories, and the specifics of the PII we collect, the sources from which the PII was collected, and the business purpose for collecting PII. ▪ Request that we delete the PII we have collected. We will fulfill the request, following verification by consistent means with the PII already collected (Driver’s License, State ID, Passport, or similar documentation), and delete any or all the PII in our possession that we collected and/or any or all PII in the possession of our service providers and counterparties, unless otherwise restricted by law or regulation. ▪ Choose to opt-out of the sale of PII, if applicable (WGAM does not sell any PII). ▪ Non-discrimination against exercising the above rights. 	
QUESTIONS on CCPA or your Rights?	Call Charles Wilkinson, Chief Compliance Officer at: 646-751-5505
DEFINITIONS	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ WGAM has no affiliates
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ WGAM does not share with nonaffiliates so they can market to you
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ▪ WGAM does not jointly market.

Privacy Policy Addendum:

This Privacy Policy Addendum describes how your personal information is collected, used, and shared when you visit the public areas on our website: www.wilkinsongam.com. Wilkinson Global Asset Management LLC does not monitor or collect any personally identifiable information from visitors to our site, though visitors to the site are able to provide such information voluntarily. We collect device/PC information using cookies (data files that are placed on your device or computer and often include an anonymous unique identifier), log files (track actions occurring on the site, and collect data including your IP address, browser type, Internet service provider, referring/exit pages, and date/time stamps), and web beacons (electronic files used to record information about how you browse the site). We use this information that we collect to help us screen for potential risk and fraud, and more generally to improve and optimize our site. When you visit the public areas on our site, we automatically collect this information. If a visitor voluntarily provides personal information via our website, such as an email address, phone number, or other personally identifiable information when inquiring about our services, Wilkinson Global Asset Management LLC does not share the visitors' personal information with unaffiliated third parties, except as required by law. Wilkinson Global Asset Management LLC uses that personal information solely to provide the information requested.