PRIVACY POLICY (2025)

Fiscal Wisdom Wealth Management values the trust you have placed in us as your Investment Advisor. As a part of our relationship, we respect and acknowledge your privacy. Regulations issued by the Federal Trade Commission and the Securities and Exchange Commission require that Fiscal Wisdom Wealth Management , provide you with written notice of our policies and procedures for disclosure of our investors' non-public personal information. Our policies relating to disclosure of non-public personal information are as follows:

We collect non-public personal information about you from the following sources:

1. Information we receive from you on new account applications or other forms,
2. Information about your transactions with us, and
3. Information we receive from a consumer reporting agency.
4. We do not disclose any non-public personal information about investors or former investors to anyone, except as permitted by law.
5. We restrict access to non-public personal information about you to our employees and agents of Fiscal Wisdom Wealth Management who need to know that information to provide services to you, and we require that all such employees and agents to adhere to our privacy policy. Furthermore, Fiscal Wisdom Wealth Management confirms that we abide by governance of the FTC and/or SEC privacy rules and will maintain a similar policy regarding protecting the privacy of your non-public personal information.

We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your non-public personal financial information.

We will not permit any Fiscal Wisdom Wealth Management vendor which has no prior business relationship with you to market its products or services to you based on information that Fiscal Wisdom Wealth Management may collect from you, including, but not limited to, information concerning your income and net worth, your credit score, and your account history with Fiscal Wisdom Wealth Management

If you have any questions about these policies or our use, maintenance, and disclosure of your non- public personal financial information, please contact our Operations Department at (860) 673-1942. We are required by law to inform you of our privacy policy once a year.