FACTS

WHAT DOES HOFMAN WEALTH MANAGEMENT, 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?

The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security number and birth date
- Assets, account balances and account transactions
- Risk tolerance and income

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 Hofman Wealth Management chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Hofman Wealth Management Share?	Can you limit this sharing?
For our everyday business purposes— such as to process your transactions, maintain your account(s), 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	No
For our affiliates' everyday business purposes— information about your transactions and experiences	No	No
For our affiliates' everyday business purposes— information about your creditworthiness	No	No
For nonaffiliates to market to you	No	No

Questions?

Call (636) 530-3293

What we do

How does Hofman Wealth Management 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. In addition to physical and electronic safeguards, we have implemented security standards and procedures to protect your information, including employee training and limited employee access.
How does Hofman Wealth Management collect my personal information?	We collect your personal information, for example, when you ■ Enter into an advisory contract or provide account information ■ Seek advice about your investments or tell us about your investment or retirement portfolios ■ Provide consent to receive email and text messages from our company We also collect your personal information from other companies. We collect your personal information through various means, including account forms, contracts and communications with you.
Why can't I limit all sharing?	Federal law gives you the right to limit only ■ 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 and individual companies may give you additional rights to limit sharing.

What we don't do

Hofman Wealth Management does not share your personal information, including mobile opt-in information, with other financial companies or affiliates for joint marketing purposes.

Definitions

Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. ■ *Hofman Wealth Management has no affiliates.*
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. ■ *Nonaffiliates we share with can include financial institutions and service providers.*
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. ■ *Hofman Wealth Management does not jointly market.*