



PRIVACY NOTICE

Lee Johnson Capital Management, LLC d/b/a Sorensen Wealth Management (referred to as "SWM") maintains physical, electronic, and procedural safeguards that comply with federal standards to protect its clients' nonpublic personal information ("information"). Through this policy and its underlying procedures, SWM attempts to secure the confidentiality of customer records and information and protect against anticipated threats or hazards to the security or integrity of customer records and information.

It is the policy of SWM to restrict access to all current and former clients' information (i.e., information and records pertaining to personal background, investment objectives, financial situation, tax information/returns, investment holdings, account numbers, account balances, etc.) to those employees and affiliated/nonaffiliated entities who need to know that information in order to provide products or services in furtherance of the client's engagement of SWM. In that regard, SWM may disclose the client's information: (1) to individuals and/or entities not affiliated with SWM, including, but not limited to the client's other professional advisors and/or certain service providers that may be recommended or engaged by SWM in furtherance of the client's engagement of SWM (i.e., attorney, accountant, insurance agent, broker-dealer, investment adviser, account custodian, record keeper, etc.); (2) required to do so by judicial or regulatory process; or (3) otherwise permitted to do so in accordance with the parameters of applicable federal and/or state privacy regulations. The disclosure of information contained in any document completed by the client for processing and/or transmittal by SWM to facilitate the commencement/continuation/termination of a business relationship between the client and/or between SWM and a nonaffiliated third party service provider (i.e., broker-dealer, investment adviser, account custodian, record keeper, insurance company, etc.), including, but not limited to, information contained in any document completed and/or executed by the client in furtherance of the client's engagement of SWM (i.e., advisory agreement, client information form, etc.), shall be deemed as having been automatically authorized by the client with respect to the corresponding nonaffiliated third party service provider.

For our everyday business purposes – With one or more of our affiliated entities, at our sole discretion and for purposes either related or unrelated to services we provide you, and to nonaffiliated entities that either perform services for us or function on our behalf (such as check printing services, account aggregation providers, broker-dealers, investment companies, and insurance companies).

Definitions: Nonaffiliates – Companies not related by common ownership or control. They can be financial and nonfinancial companies. We share personal client information with Mutual Securities, Inc, LLC a nonaffiliated registered broker-dealer.

SWM permits only authorized employees and affiliates who have signed a copy of SWM's Privacy Policy to have access to client information. Employees violating SWM's Privacy Policy will be subject to SWM's disciplinary process. Additionally, whenever SWM recommends or hires other organizations to provide services to SWM's clients, SWM will require them to sign confidentiality agreements and/or the Privacy Policy.

Should you have any questions regarding the above, please contact Dane Petty, Chief Operating Officer/Chief Compliance Officer at the principal office 817-738-1451.