FACTS	**WHAT DOES ENGAGE WEALTH GROUP, LLC (“Engage Wealth”) 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, but is not limited to: • Social Security number and income • Assets and transaction history; and • Investment experience and risk tolerance When you are *no longer* our client, we continue to share your information as described in this notice.
How?	All financial companies need to share clients’ personal information to run their everyday business. We list below the reasons financial companies can share their client’s personal information, the reasons Engage Wealth Group, LLC chooses to share, and whether you can limit this sharing.

Definitions	
Everyday Business Purposes	The actions necessary by financial companies to run their business and manage customer accounts, such as providing investment advisory and financial planning advice, processing securities transactions, and otherwise providing financial services to you.
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. Engage Wealth has no affiliates.
Non-Affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. Engage Wealth does not share information with non-affiliates for marketing purposes.
Joint Marketing	A formal agreement between nonaffiliated financial companies that market financial products or services to you. Engage Wealth does not share information with non-affiliates for marketing purposes.

Who We Are	
Who is providing this notice?	Engage Wealth Group, LLC

What We Do	
How does Engage Wealth Group, LLC protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with state and federal law. These measures include computer safeguards and secured files and buildings.
How does Engage Wealth Group, LLC collect my personal information?	We collect your personal information, for example, when you ■ open an account or give us contact information ■ enter into an investment adviser contract or give us your income information ■ tell us about your investment or retirement portfolio We also collect your personal information from other companies.
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 non-affiliates to market to you State laws and individual companies may give you additional rights to limit sharing.

Reasons we can share your personal information	Does Engage Wealth share?	Can you limit this sharing?
For our everyday business purposes– With one or more of our affiliate entities, at our sole discretion and for purposes either related or unrelated to services we provide you, and to non-affiliated entities that either perform services for us or function on our behalf (such as account aggregation providers, custodians, and investment companies.)	YES	NO
For our marketing purposes– to offer our products and services to you	NO	We do not share
For joint marketing with other financial companies	NO	We do not share
For our affiliates' everyday business purposes– information about your transactions and experiences	NO	We do not share
For our affiliates' everyday business purposes– information about your creditworthiness	NO	We do not share
For our affiliates to market to you	NO	We do not share
For non-affiliates to market to you	NO	We do not share

To limit our sharing	If you are a new client, we can begin sharing your information from the date we sent this notice. When you are no longer our client, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.
Contact Us	Call Engage Wealth at (847) 794-5000