



## FACTS

### WHAT DOES BZ WEALTH ADVISORS, 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 or Tax Identification Number, address, email and phone numbers;
- Net worth and income levels;
- Assets and transaction history; and
- Investment experience and risk tolerance.

When you are *no longer* a 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. In the section below, we list the reasons financial companies can share their clients' personal information; the reasons BZ Wealth Advisors, LLC. ("BZ Wealth") chooses to share; and whether you can limit this sharing.

| Reasons we can share your personal information                                                                                                                                                                | Does BZ Wealth share? | Can you limit this sharing? |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|-----------------------------|
| <b>For our everyday business purposes –</b><br>This includes sharing with service providers who perform services on our behalf, such as account custodians, technology providers, and compliance consultants. | YES                   | NO                          |
| <b>For our marketing purposes –</b><br>To offer our products and services to you.                                                                                                                             | NO                    | We do not share             |
| <b>For joint marketing with other financial companies</b>                                                                                                                                                     | NO                    | We do not share             |
| <b>For our affiliates' everyday business purposes –</b><br>Information about your transactions and experiences.                                                                                               | YES                   | NO                          |
| <b>For our affiliates to market to you</b>                                                                                                                                                                    | YES                   | YES                         |
| <b>For non-affiliates to market to you</b>                                                                                                                                                                    | NO                    | We do not share             |

#### To limit our sharing

**Please note** This notice is provided at the time we establish our advisory relationship. For new clients, if you wish to limit permissible sharing, you may contact us within 30 days of receiving this notice. We will not share your information for purposes you can limit until 30 days after providing this notice.

We retain client information for at least six years following account closure as required by SEC recordkeeping rules (Rule 204-2). After the required retention period, client information is securely destroyed in accordance with our information disposal procedures. Residents of certain states may have additional privacy rights, including the right to access, delete, or correct personal information, and the right to opt-out of sales of personal information. For information about state-specific rights, please contact us at 208-508-4070 or [info@bz-wealth.com](mailto:info@bz-wealth.com).

#### Questions?

Call 208-508-4070 or [info@bz-wealth.com](mailto:info@bz-wealth.com)

### Who we are

|                               |                                       |
|-------------------------------|---------------------------------------|
| Who is providing this notice? | BZ Wealth Advisors, LLC (“BZ Wealth”) |
|-------------------------------|---------------------------------------|

### What we do

|                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>How does BZ Wealth protect my personal information?</b>                               | <p>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.</p> <p>We take reasonable steps to ensure the confidentiality of client information shared via electronic messages. However, clients are reminded to avoid including sensitive personal or financial information, such as account numbers or Social Security numbers, in electronic messages.</p> |
| <b>How does BZ Wealth collect my personal information?</b>                               | <p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> <li>▪ open an account or give us contact information;</li> <li>▪ enter an investment adviser contract;</li> <li>▪ provide us information regarding your income or net worth or your investment portfolio;</li> </ul> <p>We also collect your personal information from other companies.</p>                                                                                                              |
| <b>Why can't I limit all sharing?</b>                                                    | <p>Federal law gives you the right to limit only:</p> <ul style="list-style-type: none"> <li>▪ Sharing for affiliates' everyday business purposes – information about your creditworthiness;</li> <li>▪ Affiliates from using your information to market to you; and</li> <li>▪ Sharing for nonaffiliates to market to you.</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing.</p>                                                                             |
| <b>What happens when I limit sharing or an account I hold jointly with someone else?</b> | <p>Your choices will apply to everyone on your account – unless you tell us otherwise.</p>                                                                                                                                                                                                                                                                                                                                                                                                                     |

### Definitions

|                        |                                                                                                                           |
|------------------------|---------------------------------------------------------------------------------------------------------------------------|
| <b>Affiliates</b>      | Companies related by common ownership or control. They can be financial and nonfinancial companies.                       |
| <b>Non-affiliates</b>  | Companies not related by common ownership or control. They can be financial and nonfinancial companies.                   |
| <b>Joint Marketing</b> | A formal agreement between non-affiliated financial companies that together market financial products or services to you. |

### Other important information

By signing and executing BZ Wealth's Investment Advisory Agreement, I acknowledge that I have fully read and understand this Privacy Policy and Client acknowledges receipt of this privacy policy and may opt-out of permissible sharing by contacting us. I understand that if I have any questions or concerns about this policy, it is my responsibility to discuss this with my financial professional.