



## FACTS

### WHAT DOES BZ WEALTH ADVISORS, LLC DO WITH YOUR PERSONAL INFORMATION?

<b>Why?</b>	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.
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<b>What?</b>	<p>The types of personal information we collect, and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"><li>• Social Security Number or Tax Identification Number, address, email and phone numbers;</li><li>• Net worth and income levels;</li><li>• Assets and transaction history; and</li><li>• Investment experience and risk tolerance.</li></ul> <p>When you are <i>no longer</i> a client, we continue to share your information as described in this notice.</p>
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<b>How?</b>	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.
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Reasons we can share your personal information	Does BZ Wealth share?	Can you limit this sharing?
<b>For our everyday business purposes –</b> To process your transactions, maintain your account(s), respond to court orders, legal investigations, regulatory requests and provide necessary personal information to third-party service providers (third-party administrators, auditors, CPAs, attorneys and broker-dealers).	YES	NO
<b>For our marketing purposes –</b> 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> Information about your transactions and experiences.	YES	NO
<b>For our affiliates' everyday business purposes –</b> Information about your creditworthiness.	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

<b>To limit our sharing</b>	<p><b>Please note:</b> If you are a new Client, we can begin sharing your information 30 days 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. By executing an Investment Advisory Agreement with BZ Wealth, the Client agrees to "opt-in" to this privacy policy.</p>
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<b>Questions?</b>	Call (208) 508-4070 or go to <a href="https://www.bz-wealth.com">https://www.bz-wealth.com</a> .
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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>	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.
<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 on an account I hold jointly with someone else?</b>	Your choices will apply to everyone on your account – unless you tell us otherwise.
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	