

FACTS**WHAT DOES SINGER 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** and **Income**
- **Investment Experience** and **Assets**
- **Employment Information** and **Risk Tolerance**

When you are *no longer* our customer, we continue to share your information as described in this notice.

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 Singer Wealth Advisors chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Singer Wealth Advisors 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, report to credit bureaus	YES	NO
For our marketing purposes – to offer our products and services to you	NO	We don't share
For joint marketing with other financial companies	NO	We don't share
For our affiliates' everyday business purposes – information about your transactions and experiences	NO	We don't share
For our affiliates' everyday business purposes – information about your creditworthiness	NO	We don't share
For non-affiliates to market to you	NO	We don't share

Questions?

Call **561-998-9985** or go to **www.singerwealth.com**

Who we are

Who is providing this notice?

Singer Wealth Advisors, LLC.

What we do

How does Singer Wealth Advisors protect my personal information?

To protect your personal information from unauthorized access, use, or disclosure, we maintain administrative, technical, and physical safeguards designed to comply with federal law. These safeguards include secure systems, access controls, and procedures intended to protect nonpublic personal information.

We maintain policies and procedures designed to limit access to customer information to those employees and service providers who need to know such information in order to provide advisory services, and to ensure appropriate use of such information.

How does Singer Wealth Advisors collect my personal information?

We collect your personal information, for example, when you

- **Seek advice about your investments or Enter into an investment advisory contract**
- **Show your driver's license or Give us your contact information**
- **Tell us about your investment or retirement portfolio**

- **Through third-party platforms and service providers you authorize us to use in connection with managing or monitoring your accounts**

We also collect your personal information from others, such as credit bureaus, affiliates, or 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 nonaffiliates to market to you

State laws and individual companies may give you additional rights to limit sharing.

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- ***Singer Wealth Advisors does not share with our affiliates.***

Non-affiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- Singer Wealth Advisors may share information with non-affiliated third parties such as custodians, broker-dealers, technology service providers (including portfolio management and account access platforms), alternative investment sponsors, and other service providers as necessary to provide advisory services, process transactions, and comply with legal and regulatory obligations.***
- ***Singer Wealth Advisors shares information with Madison Avenue Securities, LLC, a registered broker-dealer.***

Joint Marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- ***Singer Wealth Advisors does not jointly market.***

Other important information

Certain supervised persons of Singer Wealth Advisors are affiliated with separate entities that provide tax, accounting, or legal services. Client information is not shared with these affiliated entities unless authorized by the client or required to provide agreed-upon services.