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Information Collection and Use - LKWM may require you to provide the firm with certain personally identifiable information including, but not limited to, your name, phone number, and postal address. This information is used to contact or identify you. For business purposes— such as to process your transactions, maintain your account(s), or respond to court orders and legal investigations, the firm may collect, track, and share Social Security numbers, Tax ID’s, income, account balances, and credit information. The federal government and some states allow you to limit this collection and sharing. Such limits may prevent our providing necessary services. For more information, or to limit information sharing, contact us at the phone number or email address listed below for more information.

Log Data - When you visit our company website, the firm will collect information that your browser sends to us called Log Data. This Log Data may include information such as your computer’s Internet Protocol (IP) address, browser version, pages of our Service that you visit, the time and date of your visit, the time spent on those pages, and other statistics.

Cookies - Cookies are files with a small amount of data that are commonly used as a unique, anonymous identifier. These are sent to your browser from the website you visit and stored on your computer’s hard drive. LKWM’s website uses these “cookies” to collect information and to improve our Service. You have the option to either accept or refuse these cookies and know when a cookie is being sent to your computer. If you choose to refuse these cookies, you may not be able to use some portions of the firm’s website services.

Third Party Service Providers - LKWM may share information with third-party companies and individuals. These third parties will have access to your Non-Public Personal Information to perform the tasks assigned to them on our behalf. They are not allowed to disclose or use the information for any other purpose. We require our service providers to implement appropriate safeguards to protect your personal information and regularly review their compliance. The third parties have been engaged to:

- To facilitate our investment advisory services;
- To provide investment advisory services on our behalf;
- To perform operational-related services; or
- To assist us in analyzing how our investment advisory services are used.
- Pursuant to law, rules, regulations, standard security industry practices, in connection with a subpoena, discovery request, or other legal/regulatory process compelling the sharing of information.

Links to Other Sites - Our website may contain links to other sites that are not operated by us. If you click on a third-party link, you will be directed to that site. LKWM strongly advises you to review the Privacy Policy of these websites, as we have no control over and assume no responsibility for the content, privacy policies, or practices of any third- party sites or services.

Changes to This Privacy Policy - LKWM may update our Privacy Policy at any time, and we advise you to review the website periodically for any changes. The firm will notify you of any changes by posting the new Privacy Policy on the website. All changes are effective immediately after they are posted on the web page.

Incident Response & Notification - LKWM maintains a written incident response program to detect, respond to, and recover from unauthorized access to personal information. In the event of a data breach, affected individuals will be notified within 30 days, as required by law.

Contact Us - If you have any questions or suggestions about our Privacy Policy, please feel free to contact us by phone at 301-450-2617 or by email at will@lkwealthmanagement.com.