Rev. 10/9/23

FACTS

WHAT DOES PrairieView Wealth Partners, LLC ("PrairieView") 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 • Income • Assets When you are *no longer* our client, we may continue to share your information as described in this notice.
How?	All financial companies need to share client personal information to run their everyday business. In the section below, we list the reasons financial companies may share their client personal information; the reasons PrairieView Wealth Partners, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does PrairieView 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	Yes	No
For our marketing purposes— to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	We don't share
For our affiliates' everyday business purposes— information about your transactions and experiences	Yes	No
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 708-326-4750 or go to www.prairieviewwealthpartners.com

Who we are	
Who is providing this notice?	PrairieView Wealth Partners, LLC

What we do	
How does PrairieView protect my personal information?	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. Our online environment uses security technologies, including layered security and access controls over personal information.
How does PrairieView collect my personal information?	We collect your personal information, for example, when you • Open an account or enter into an advisory relationship • Apply for insurance or seek advice about your investments • Tell us about your investment or retirement portfolios 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. See below for more on your rights under state law.

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. • Our affiliates include Focus Forward
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. • Non-affiliates we may share information with include investment advisory firms such as Schwab.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. • PrairieView does not jointly market

Other important information

Information for California, North Dakota, and Vermont Clients:
In accordance with applicable state law, if the mailing address provided for your account is in California, North Dakota, or Vermont, we will automatically treat your account as if you do not want us to disclose your personal information to non-affiliated third parties for purposes of them marketing to you, except as permitted by the applicable state law.