NORTHWEST FINANCIAL ADVISORS

Privacy Policy

FACTS	WHAT DOES NORTHWEST FINANCIAL ADVISORS LLC (NWFA) 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 • Risk tolerance • Account balances • Transaction history
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 NWFA chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does NWFA share?	Can you limit this sharing?
For our everyday business purposes such as to process your transactions, maintain your account(s) or 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 our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	No	We don't share

To limit our sharing	• Call **703-810-1072** (1-800-269-2156 toll-free) • Visit **www.nwfllc.com** • Please note: If you are a *new* customer, we can begin sharing your information 30 days from the date we sent this notice. When you are no longer our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.
Questions?	Call **703-810-1072** (1-800-269-2156 toll-free) or visit **www.nwfllc.com**.

WHO WE ARE	
Who is providing this notice?	Northwest Financial Advisors LLC

WHAT WE DO	
What does NWFA do to 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.
How does NWFA collect my personal information?	We collect your personal information, for example, when you: • Enter into an investment advisory contract • Seek financial advice • Open an account • Tell us about your investment or retirement portfolio • Give us your employment history 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.
What happens when I limit sharing for an account that I hold jointly with someone else?	Your choices apply to everyone on your account — unless you tell us otherwise.

DEFINITIONS	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. Our affiliates include: • *NW Capital Management LLC* • *Northwest Financial Group* • *NW Insurance Agency LLC* • *Northwest Tax Group LLC* • *Northwest Title & Escrow LLC* • *Northwest Federal Credit Union*
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. • *NWFA does not share with nonaffiliates so they can market to you.*
Joint Marketing	A formal agreement between nonaffiliated financial companies that, together, market financial products or services to you • *NWFA does not jointly market*