

# FACTS

## WHAT DOES GUANILL WEALTH MANAGEMENT, INC. 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.
<b>What?</b>	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> <li>• Social Security number and income</li> <li>• Account balances and payment history</li> </ul>
<b>How?</b>	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 we choose to share; and whether you can limit this sharing.

Reasons we can share your personal information	Do we share?	Can you limit this sharing?
<b>For our everyday business purposes—</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
<b>For our marketing purposes—</b> to offer our products and services to you	Yes	Yes
<b>For joint marketing with other financial companies</b>	No	We don't share
<b>For our affiliates' everyday business purposes—</b> information about your transactions and experiences	Yes	Yes
<b>For our affiliates' everyday business purposes—</b> information about your creditworthiness	No	We don't share
<b>For our affiliates to market to you</b>	Yes	Yes
<b>For non-affiliates to market to you</b>	No	We don't share

<b>To limit our sharing</b>	<ul style="list-style-type: none"> <li>• Mail the form below</li> </ul> <p><b>Please note:</b></p> <p>If you are a <i>new</i> customer, we can begin sharing your information from the date you received this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p> <p>However, you can contact us at any time to limit our sharing.</p>
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<b>Questions?</b>	Call 916-359-2750
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Who we are	
Who is providing this notice?	Guanill Wealth Management, Inc.
What we do	
How do we protect your 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 do we collect your personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> <li>• Open an account or deposit money</li> </ul>
Why can't I limit all sharing?	Federal law gives you the right to limit only <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</li> <li>• Sharing for non-affiliates to market to you</li> </ul> State laws and individual companies may give you additional rights to limit sharing.
What happens when I limit sharing for an account I hold jointly?	Your choices will 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 non-financial companies.
Non-affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
Joint marketing	A formal agreement between non-affiliated financial companies that together market financial products or services to you.

Mail-in Form		
<p>If you have a joint account, your choice(s) will apply to everyone on your account unless you mark below.</p> <p><input type="checkbox"/> Apply only to me</p>	<p>Mark any you want to limit:</p> <p><input type="checkbox"/> Do not use my information to market to me.</p> <p><input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me.</p> <p><input type="checkbox"/> Do not share my personal information with non-affiliates to market their products and services to me.</p>	
	Name	
	Address	
	City, State, Zip	
	Account #	
		<p><b>Mail to:</b></p> <p><b>Guanill Wealth Management, Inc.</b></p> <p><b>333 University Avenue, Suite 200</b></p> <p><b>Sacramento, CA 95825</b></p>

## **SMS Communications**

By providing your phone number, you consent to receive SMS messages from Guanill Wealth Management, Inc. regarding inquiries, appointment reminders, follow-ups, and relevant updates. Message frequency may vary. Message and data rates may apply.

We collect and store your phone number for the purpose of delivering these messages. We do not sell, rent, or share phone numbers with third parties for marketing purposes.

You may opt out of SMS messages at any time by replying STOP. Reply HELP for more information.

We use commercially reasonable security measures to protect your data. Mobile carriers are not liable for delayed or undelivered messages.

## **SMS Terms**

By opting into SMS messaging, you agree to receive text messages from Guanill Wealth Management, Inc. for updates, scheduling, reminders, and related communication. Message frequency varies. Msg & data rates may apply.

To opt out, reply STOP at any time. For assistance, reply HELP or contact us at [ed@edgwealth.com](mailto:ed@edgwealth.com).

You acknowledge SMS delivery is not guaranteed and may depend on your carrier and mobile device. Mobile carriers are not responsible for delayed or undelivered messages.

## **SMS Platform**

Lead opted in via LinkedIn Lead Gen Form. The form included LinkedIn's standard consent: 'By clicking Submit, you agree to send your information to Guanill Wealth Management, Inc., who agrees to use it according to their privacy policy.' Msg & data rates may apply. Reply STOP to opt out.

## **Use Case Description**

We send SMS messages to follow up on inquiries initiated by users on our LinkedIn lead gen ads, including scheduling links, appointment reminders, and relevant updates. No promotional bulk messaging. Users explicitly provide their phone number and consent via the LinkedIn Lead Gen Form and our website's SMS Terms.