

# ACCELERATED WEALTH ADVISORS, LLC

## PRIVACY POLICY



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We are committed to protecting your privacy. We have strict policies and procedures in place to keep your non-public personal information private. We will disclose your non-public personal information with non-affiliated third parties or affiliated companies to provide advisory services to you or as required or permitted by law. This notice serves as a summary of our practices. You do not need to take any action as a result of this notice unless you have any questions or concerns about it.

This Privacy Policy is being provided in accordance with the requirements of data privacy laws that are applicable to Accelerated Wealth Advisors, LLC. References to “you” or an “investor” in this Privacy Notice mean any investor who is an individual, or any individual connected with an investor who is a legal person, as applicable.

### Types of Information We Collect

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In order to conduct our advisory business, we may collect and store the following non-public personal information about you:

- (i) information that comes from your subscription forms or other forms or documents that you complete, such as name, address, telephone number, email address, social security number, birth date, employment status, net assets, income, current investments, and investment experience;
- (ii) information, including related information such as positions and balances, about your transactions with us, our affiliates and non-affiliated third parties;
- (iii) information received from a consumer reporting agency; and
- (iv) any other information that is pertinent to providing advisory services to you from other sources with your consent or the consent of your representative.

### How We Protect the Confidentiality and Security of Your Non-Public Personal Information

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We have implemented procedures to protect your privacy. They include physical, administrative, and technical safeguards that are updated as new technologies are introduced. The only employees who have access to your personal records are those who need it to conduct business on your behalf or to provide you with products or services. These employees are informed of our procedures for adherence to confidentiality of client non-public personal information and of their responsibility in applying those procedures. When possible, we contractually limit the information sharing ability on non-affiliated third parties with whom we share your non-public personal information.

### Information-Sharing Practices

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We do not disclose any non-public personal information about our prospective, current or former clients or investors to anyone to provide advisory services to you or as required or permitted by law.

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In order to effectively provide our investment advisory services, we must use the services of service providers and financial institutions, including various non-affiliated third parties, such as, but not limited to, account custodians and broker-dealers, as well as, companies that can assist us with research, administrative support legal and governance in addition to affiliated companies such as, but not limited to, affiliated companies that can assist us with research and administrative support. It may be necessary to disclose some or all of your non-public personal information collected from you, as described above, to these parties. However, we will disclose your non-public personal information only as is required to provide advisory services to you or as required or permitted by law.

Specifically, we may share non-public personal information that we collect from and about you with the following non-affiliated third parties:

- (i) governmental agencies, law enforcement authorities, and self-regulatory organizations to the extent required or permitted by law;
- (ii) non-affiliated third parties, with your consent or as directed by your representative;
- (iii) non-affiliated third parties, to the extent necessary to prevent actual or potential fraud, unauthorized transactions, claims or other liability; and
- (iv) non-affiliated third parties, for required institutional risk control or for resolving client disputes or inquiries.

### **Our Treatment of Information about Former Clients**

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Protecting your privacy goes beyond our relationship with you as our client. Should your relationship with us terminate, we will not share your non-public personal information with non-affiliated third parties except as required or permitted by law.

### **Client Right to Correct, Amend or Delete Information**

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You may submit a written request to us to correct, amend or delete any non-public personal information in our possession. We anticipate responding to your request within ten (10) business days or as required by applicable state law.

### **Changes in our Privacy Practices and Procedures**

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You will be notified in writing of any amendments to our privacy practices and procedures. You will also be notified in writing on an annual basis of our privacy practices and procedures, even if no amendments have been made to them. If you have any questions or concerns about our privacy policy, or wish for us not to share your information as stated above, please write Accelerated Wealth Advisors, LLC Attn: Privacy Inquiry, 13570 Meadowgrass Drive #100, Colorado Springs CO 80921 or call us at (719) 466-5631.

## FACTS

### WHAT DOES ACCELERATED 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
- Account balances and net worth
- Contact information and date of birth

#### How?

All financial companies need to share clients' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients' personal information; the reasons Accelerated Wealth chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Accelerated Wealth Advisors, LLC 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>	Yes	Yes
<b>For our affiliates' everyday business purposes—</b> information about your transactions and experiences	Yes	No
<b>For our affiliates' everyday business purposes—</b> information about your creditworthiness	Yes	Yes
<b>For nonaffiliate business partners —</b> for business operations, legal, and compliance tasks	Yes	No
<b>For nonaffiliates to market to you</b>	Yes	Yes

#### To limit our sharing

- Call 719-466-5631—ask to speak with our Chief Compliance Officer
- Mail the **form** below

**Please note:**

If you are a *new* customer, we can begin sharing your information 10 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 719-466-5631 or go to [www.acceleratedwealth.com](http://www.acceleratedwealth.com)

## Who we are

**Who is providing this notice?**

Accelerated Wealth Advisors, LLC

## What we do

**How does Accelerated Wealth Advisors, LLC 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 Accelerated Wealth Advisors, LLC collect my personal information?**

We collect your personal information, for example, when you

- Engage with us as a new client
- Open a new account or move money
- Sign up for our marketing content

We also may collect your personal information from 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 I hold jointly with someone else?**

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 nonfinancial companies.

- *Accelerated Wealth, LLC*

**Nonaffiliates**

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

- *Act-On, Lone Beacon*

**Joint marketing**

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

## Other important information

Please see Accelerated Wealth Advisors, LLC's Privacy Policy for additional information.



## Mail-in Form

**Leave Blank  
OR**

If you have a joint account, your choice(s) will apply to everyone on your account unless you mark below.

- Apply my choices only to me

Mark any/all you want to limit:

- Do not share information about my creditworthiness with your affiliates for their everyday business purposes.
- Do not allow your affiliates to use my personal information to market to me.
- Do not share my personal information with nonaffiliates to market their products and services to me.

**Name**

**Address**

**City, State, Zip**

**Phone Number**

**Email Address**

**Mail to:**

Accelerated Wealth  
Advisors, LLC  
13570 Meadowgrass  
Dr #100  
Colorado Springs, CO  
80921