

FACTS

WHAT DOES DESTINATION WEALTH MANAGMENT 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:

- [Name](#) and [Social Security Number](#).
- [Phone number, address](#) and [account balance](#).
- [Investment and financial objectives](#) and [transaction activity](#).

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 [Destination Wealth Management \(“DWM”\)](#) chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does DWM 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, or report to credit bureaus	Yes	No
For our marketing purposes— to offer our products and services to you	No	We don’t share
For joint marketing with other financial companies	No	We don’t share
For our affiliates’ everyday business purposes— information about your transactions and experiences	No	We don’t share
For our affiliates’ everyday business purposes— information about your creditworthiness	No	We don’t share
For our affiliates to market to you	No	We don’t share
For nonaffiliates to market to you	No	We don’t share

Questions

Call [\(925\) 935-2900](#) or go to [www.destinationwm.com](#)

Who we are

Who is providing this notice?

Destination Wealth Management (DWM)

What we do

How does **DWM** protect my personal information?

To protect your personal information from unauthorized access and use, we use security measures that comply with applicable federal and state laws. These measures include computer safeguards and secure files and buildings. We also protect your information by restricting access to the information and maintaining its confidentiality.

How does **DWM** collect my personal information?

We collect your personal information, for example, when you

- [Receive financial planning](#) or [investment advisory services](#).
- [Open an account](#) or [update your client profile, such as your primary residence](#).

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.

What happens when I limit sharing for an account I hold jointly with someone else?

[Your choices will apply to everyone on your account.](#)

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and non-financial companies.

- [DWM does not have any affiliates.](#)

Nonaffiliates

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

- [DWM does not have any non-affiliates.](#)

Joint marketing

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

- [DWM does not have any joint marketing arrangements.](#)

Other important information

If you are a California resident, California law provides you with additional rights. To learn more about your California privacy rights under the California Consumer Privacy Act ("CCPA") as amended by the California Privacy Rights Act ("CPRA"), please see our CCPA Privacy Notice: <https://destinationwm.com/privacy-policy>.

We do not share, sell, rent, or disclose mobile information (including phone numbers) obtained through text messages, or any other means, with third parties or affiliates for marketing purposes. Mobile information will only be used for purposes directly related to the services we provide. Any sharing of information with service providers will be limited to those acting on our behalf to perform services necessary for our operations.