

**FACTS****WHAT DOES DESTINATION WEALTH MANAGEMENT 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](#) chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does <a href="#">Destination Wealth Management</a> 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	<b>Yes</b>	<b>No</b>
<b>For our marketing purposes—</b> to offer our products and services to you	<b>No</b>	<b>No</b>
<b>For joint marketing with other financial companies</b>	<b>No</b>	<b>No</b>
<b>For our affiliates' everyday business purposes—</b> information about your transactions and experiences	<b>No</b>	<b>No</b>
<b>For our affiliates' everyday business purposes—</b> information about your creditworthiness	<b>No</b>	<b>No</b>
<b>For our affiliates to market to you</b>	<b>No</b>	<b>No</b>
<b>For nonaffiliates to market to you</b>	<b>No</b>	<b>No</b>

**Questions**

Call [\(925\) 935 2900](tel:9259352900) or go to [www.destinationwm.com](http://www.destinationwm.com)

Who we are	
<b>Who is providing this notice?</b>	<b>Destination Wealth Management (DWM)</b>
What we do	
<b>How does DWM protect my personal information?</b>	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. We also protect your information by restricting access to the information and maintaining its confidentiality.
<b>How does DWM collect my personal information?</b>	We collect your personal information, for example, when you <ul style="list-style-type: none"> <li>■ <a href="#">Receive financial planning</a> or <a href="#">asset management services</a></li> <li>■ <a href="#">Open an account</a> or <a href="#">change investment objectives</a></li> </ul>
<b>Why can't I limit all sharing?</b>	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 nonaffiliates to market to you</li> </ul>
<b>What happens when I limit sharing for an account I hold jointly with someone else?</b>	<a href="#">Your choices will apply to everyone on your account.</a>
Definitions	
<b>Affiliates</b>	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> <li>■ <a href="#">DWM does not have any affiliates</a></li> </ul>
<b>Nonaffiliates</b>	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> <li>■ <a href="#">DWM does not have any non-affiliates</a></li> </ul>
<b>Joint marketing</b>	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> <li>■ <a href="#">DWM does not have any joint marketing arrangements</a></li> </ul>
Other important information	
<a href="#">We periodically review our policies and practices to protect your nonpublic private information and will provide notice of changes in our information sharing practices.</a>	