

## FACTS

### WHAT DOES GLASS JACOBSON WEALTH ADVISORS 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
- Assets
- Risk Tolerance
- Tax Information
- Investment Experience
- Retirement Assets

#### How?

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

Reasons we can share your personal information	Does Glass Jacobson Wealth Advisors 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	Yes
<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	No	No
<b>For nonaffiliates' everyday business purposes—</b> information about your creditworthiness	We don't share	No
<b>For our affiliates to market to you</b>	No	No
<b>For nonaffiliates to market to you</b>	Yes	Yes

#### To limit our sharing

- Call: 1410-356-1000
- Visit us online: [glassjacobson.com](http://glassjacobson.com)
- Email us at [alevitan@gjwadvisors.com](mailto:alevitan@gjwadvisors.com)

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 1-410-356-1000 or email us at [alevitan@gjwadvisors.com](mailto:alevitan@gjwadvisors.com)

## Who we are

**Who is providing this notice?**

Glass Jacobson Investment Advisors LLC d/b/a Glass Jacobson Wealth Advisors

## What we do

**How does Glass Jacobson Wealth Advisors 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 Glass Jacobson Wealth Advisors collect my personal information?**

We collect your personal information, for example, when you

- seek financial advice, or enter into an investment advisory contract
- seek advice about your investments
- tell us about your investment or retirement portfolio

**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 and or policy unless you tell us otherwise.

## Definitions

**Affiliates**

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

- *None*

**Nonaffiliates**

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

- *As of October 1st 2022 our Nonaffiliates include YHB and Glass Jacobson Investment Advisors LLC.*

**Joint marketing**

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

- *As of October 1st 2022 our Joint Marketing partners include YHB and Glass Jacobson Investment Advisors LLC.*

## Other important information

To opt out of Nonaffiliate information sharing in general and/or to opt out of our Nonaffiliate joint marketing campaigns please call 1-410-356-1000 and ask for Compliance and/or email [alevitan@gjwadvisors.com](mailto:alevitan@gjwadvisors.com)

