

Halbert Wealth Management, Inc.

Notice of Privacy Practices

We consider it our great privilege to serve your financial needs. We have always been committed to maintaining customer confidentiality. As we serve your financial relationship, we are committed to safeguarding customer information and take this opportunity to clarify our privacy practices.

The privacy policies described in this notice apply to individuals who obtain or apply for a financial product or service, or have done so in the past and are customers of Halbert Wealth Management.

As part of our business, we obtain certain “non-public personal financial information” about you, which for ease of reading we will refer to as “information” in this notice. This includes information such as your social security number, date of birth, banking information, financial account numbers, sources of income, etc., which we receive from you on applications, investment advisory contracts or from other forms, as well as information concerning your transactions with us.

- We do not disclose this information about you or any former customers with any non-affiliated third parties, except as required to process transactions, service your account, comply with regulators and accountants, or as required by law.
- We do not sell or otherwise share this information with third parties.
- We restrict access to the information to authorized individuals who need to know this information to provide service and products to you.
- We maintain physical, electronic and procedural safeguards to protect the confidentiality of your information.
- Your information may be shared with our affiliates which are money management companies and other financial service providers.

You do not need to call or do anything as a result of this notice. It is meant to inform you of how we safeguard your non-public personal financial information. You may wish to file this notice with your papers. We reserve the right to change this policy as needed. You can contact us at 800-348-3601 for the latest Policy or you can view it on our website - **www.halbertwealth.com**.

Thank you for the opportunity to serve you. Your relationship and trust are very important to us.

August 2025