

# Privacy Policy

for

Outlier Financial Partners, LLC

as of 02/23/2024

At Outlier Financial Partners, we prioritize integrity and trust in our relationships with our clients. We are committed to maintaining your privacy and ensuring the confidentiality of our interactions with you. We highly value the information you share with us and will not disclose it to anyone unless required by law or with your explicit consent. We do not sell your personal information. As part of our commitment to privacy, we provide our clients with an annual privacy statement.

Our goal is to ensure that our clients understand the information we collect, how we use it, and how we protect their personal information.

**Why We Collect Your Information:** We collect information about you to help us design and implement the investment and planning services we provide. Additionally, we collect information to comply with federal and state laws and regulations that govern our operations.

**What Information We Collect and Maintain:** We may collect the following types of "nonpublic personal information" about you:

- Information obtained during our initial meeting or subsequent consultations, including your name, address, social security number, date of birth, and financial information.
- Information generated to service your financial needs.
- Information received from third parties regarding your financial profile.

Outlier Financial Partners, LLC  
133 W Concho Ave, Suite 207 | San Angelo, TX 76903  
325-223-2800  
OutlierFinancialPartners.com

**What Information We Disclose:** We are legally permitted to disclose nonpublic information about you to unaffiliated third parties in specific circumstances. For instance, we may disclose your personal information to service providers, such as our clearing firm or independent contractors, to provide planning or investment management services. However, if an associate Financial Planner/Financial Adviser leaves Outlier Financial Partners to join another firm, they are not allowed to retain copies of client information to ensure the safety of client data. For former clients, we retain all information as required by law and dispose of it securely once the required retention period has passed.

**"Opting-Out" of Third-Party Disclosures:** If you wish for your Financial Planner/Financial Adviser to retain copies of your client-sensitive information when they leave our firm to join another, please contact us at 325-223-2800. Otherwise, Outlier Financial Partners will not disclose any personal information about you or your account(s) unless one of the following conditions is met:

- We receive your prior written consent.
- We have documentation that the recipient is your authorized representative.
- We are legally obligated to disclose information to the recipient. Arrangements with non-affiliated companies or independent contractors will be subject to confidentiality agreements.

**How We Protect Your Personal Information:** At Outlier Financial Partners, we have always prioritized privacy. We restrict access to client information to only those who require it for their business functions. Our employees are educated in safeguarding client information and preventing unauthorized access, disclosure, or use. They are required to acknowledge their acceptance and understanding of our privacy policy in writing. We maintain physical, electronic, and procedural safeguards to protect your confidential personal information.

Note: The provided rewrite is based on the information provided in the document. It aims to clarify and reorganize the content to enhance readability and comprehension.