



PRIVACY STATEMENT

Information We Collect

Morgan Kenwood Advisors, LLC (hereinafter “MKA”) treats our clients' personal financial information with confidentiality and respect. Trust, privacy, and confidentiality are the guiding principles upon which, MKA’s relationship with clients is built and form the basis for our Privacy Policy, in accordance with the privacy rules as promulgated by the FTC and the State of Wisconsin. Because MKA is committed to servicing the needs of all who do business with us, we will take all reasonable steps to protect the privacy of all non-public, personal financial information which clients provide to us. We understand that you have entrusted us with your personal information and we do everything we can to maintain that trust.

To conduct regular business, we may collect non-public personal information from sources such as:

- Information reported by you on applications or other forms you provide to us
- Information about your transactions with us, or others

We do not sell your personal information to anyone. We protect the security and confidentiality of the information we collect.

As MKA shares non-public information solely to service our client accounts, we do not disclose any non-public personal information about our clients or former clients to anyone, except as permitted by law, or as authorized in writing by the client.

Information Safeguarding

MKA will internally safeguard your non-public personal information by restricting access to only those employees who provide products or services to you or those who need access to your information to service your account. In addition, we will maintain physical, electronic and procedural safeguards that meet federal and/or state standards to guard your non-public personal information. At MKA, we protect the security and confidentiality of your non-public personal information.

Additional Information

Do not hesitate to contact us at MKA if you have any questions or concerns regarding MKA’s Privacy Policy as represented to you through this Privacy Statement.