

FACTS

WHAT DOES THREADLINE WEALTH LLC 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 may collect and share depends on the product or service you have with us. This information can include: ■ Tax Identification Number ■ Securities positions ■ Investment Experience ■ Income ■ Risk Tolerance ■ Account balances	
	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 Threadline Wealth LLC chooses to share; and whether you can limit this sharing.	
	Reasons we can share your personal information	Does Threadline Wealth share?Can you limit this sharing?
	For our everyday business purposes— such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	YESNO
	For our marketing purposes— to offer our products and services to you	YESNO
	For joint marketing with other financial companies	NOWE DON’T SHARE
	For our affiliates’ everyday business purposes— information about your experiences	NOWE DON’T SHARE
	For our affiliates’ everyday business purposes— information about your creditworthiness	NOWE DON’T SHARE
	For our affiliates to market to you	NOWE DON’T SHARE
	For nonaffiliates to market to you	NOWE DON’T SHARE
To limit our sharing	■ Call 425-650-9500 — our menu will prompt you through your choice(s) ■ Visit us online: threadlinewealth.com Please note: If you are a <i>new</i> customer, we can begin sharing your information 5 days from the date we sent this notice. When you are <i>no longer</i> 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 425-650-9500 or go to threadlinewealth.com	

Who we are	
Who is providing this notice?	Threadline Wealth LLC
What we do	
How does Threadline Wealth 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. We restrict access to your personal information to those employees who need it to perform their job responsibilities.
How does Threadline Wealth collect my personal information?	We collect your personal information, for example, when you: ■ seek investment advice ■ enter into an agreement with Threadline Wealth LLC
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?	We will stop sharing all information about that account.
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. ■ <i>Threadline Wealth does not share with affiliates.</i>
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. ■ <i>Threadline Wealth does not share with nonaffiliates so they can market to you.</i>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. ■ <i>Threadline Wealth does not engage joint marketing.</i>
Other important information	
You may also opt out from sharing your information by sending an e-mail to compliance@threadlinewealth.com or call 425-650-9500.	