

FACTS**WHAT DOES CB&H WEALTH MANAGEMENT SERVICES, LLC (“CBHWM”) 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: <ul style="list-style-type: none"> ▪ Social security number and income ▪ Account balances and transaction history ▪ Investment experience and risk tolerance 	
HOW?	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 CBHWM chooses to share; and whether you can limit this sharing.	
Reasons we can share your personal information	Does CBHWM Share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s) or respond to court orders and legal investigations.	Yes	No
For our marketing purposes - to offer our products and services to you	No	We don’t share.
For joint marketing with other financial companies	No	We don’t share
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes – information about your creditworthiness	No	We don’t share
For our affiliates to market to you	Yes	Yes
For non-affiliates to market to you	No	We don’t share
To limit our sharing	<ul style="list-style-type: none"> ▪ Call (804) 673-4224 or ▪ Mail the form below <p>Please note:</p> <p>If you are a <i>new</i> customer, we can begin sharing your information 30 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.</p> <p>However, you can contact us at any time to limit our sharing.</p>	
Questions?	Call Tina Leiter at (804) 673-5703	

**Mail-in Form**

<p>If you have a joint account, your choice will apply to everyone on your account unless you mark below.</p> <p><input type="checkbox"/> Apply my choice only to me</p>	<p>Check if you want to limit:</p> <p><input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me.</p>	<p>Mail to:</p> <p>CB&H Wealth Management Services, LLC 200 South 10th Street, Suite 900 Richmond, VA 23219</p>	
	Name		
	Address		
	City, State, Zip		
	Account #		

What we do	
How does CBHWM 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.
How does CBHWM collect my personal information?	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> ▪ Provide account information or give us your contact information ▪ Seek financial advice or seek advice about your investments ▪ Enter into an investment advisory contract <p>We also collect your personal information from others, such as credit bureaus, affiliates or other companies.</p>
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> ▪ sharing for affiliates' everyday business purposes—information about your creditworthiness ▪ affiliates from using your information to market to you ▪ sharing for non-affiliates to market to you
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account - unless you tell us otherwise.
Definitions	
Affiliates	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> ▪ <i>Our affiliates include companies with a common CB&H name such as Cherry Bekaert & Holland, L.L.P., of which CBHWM is a wholly owned subsidiary.</i>
Non-Affiliates	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> ▪ <i>CBHWM does not share with non-affiliates so they can market to you.</i>
Joint Marketing	<p>A formal agreement between non-affiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> ▪ <i>CBHWM does not jointly market.</i>