

FACTS

WHAT DOES AMG Wealth Management, LLC (AMG) DO WITH YOUR PERSONAL INFORMATION?

3/30/26

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: Social Security number and identity information, address, telephone number, e-mail. **Securities accounts** and account holdings, balances, family composition and background. **Securities transactions** and investment objectives, net worth, income, fee payment history.

How?

All Financial companies need to share **customer** personal information to run their everyday business. In the section below, we list the reasons financial companies can share their **customer** personal information: the reasons **AMG** chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does RSE Share?	Can you limit this sharing?
For our everyday business purposes - Such as process your transactions, maintain your account(s) respond to court orders and legal investigations, or report to the credit bureaus.	YES	NO
For our marketing purposes - To offer our products and services to you.	YES	NO
For joint marketing with other financial companies.	NO	N/A
For our affiliates' everyday business purposes - Information about your transactions and experiences.	YES	NO
For our affiliates' everyday business purposes - Information about your creditworthiness.	YES	YES
For our affiliates to market to you	YES	YES
For our nonaffiliated to market to you	NO	N/A

To limit our sharing

- * Call 813-732-7915
- * Visit us on line: www.amg-wealth.com
- * Mail the Order form below

Please Note

If you are a new customer, we can begin sharing your information 30 days from the date we sent this notice. When you are no longer 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 813-732-7915 for go to www.amg-wealth.com

Mail-in Form

Mark any/all you want to limit:

☐ Do not share information about my creditworthiness with your affiliates for their everyday business purposes.

☐ Do not allow your affiliates to use my personal information to market to me.

Name

Address

City, State, Zip

Mail To:

AMG Wealth Management, LLC
3179 Tour Trace
Land O' Lakes, FL 34638

Who we are	
Who is providing this notice?	AMG Wealth Management, LLC ("AMG")
What we do	
How does AMG 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 non-public personal information to those employees who need to know that information to service your account.
How does AMG collect my personal information?	We collect your personal information, for example, <u>when</u>: * You sign our agreement or open a brokerage /custodial account. * Communicate with us or purchase or sell securities. * Deposit or withdraw funds, <u>provide</u> or update your investment portfolio.
Why can't I limit all sharing?	Federal law gives you the right to limit <u>only</u>: * 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 <u>limit</u> sharing for an account I hold jointly with someone else?	Your Choices will apply to everyone on your account.
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. We will not share your information with any <u>nonaffiliates</u> unless such sharing is necessary to service your account or required by law.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. * We have not entered any joint marketing agreements.
Other important information	