PRIVACY POLICY

This is for informational purposes only. No action is required on your part.

BIP Wealth, LLC values our clients and makes it a top priority to safeguard the confidential information of our clients. We are committed to protecting your privacy and maintaining your trust and confidence.

BIP Wealth, LLC collects information about you to assist us in providing services and products to help you meet your financial goals, and provide high standards of client service. Additionally, information is obtained from you to help us fulfill our legal and regulatory requirements. Information collected may vary depending on the scope of your engagement with us.

What Information Do We Collect and From Where?

BIP Wealth, LLC collects nonpublic personal information about you from the following sources:

- Information provided on applications and related forms, such as name, address, telephone number, Social Security or Tax Identification number, birth date, net worth, annual income, information about your personal finances, tax and estate planning, and financial information such as bank accounts.
- Information about your transactions with us, such as accounts balances, account numbers, and account activity.
- Information we may receive from non-affiliated third parties, including consumer reporting agencies.

What Information Do We Disclose and To Whom Do We Disclose It?

We do not disclose any nonpublic information about you without your express consent, except as permitted by law and as needed to provide the services you have requested. This applies to current as well as former clients. We train our staff to take caution in handling personal information. We restrict access to nonpublic information about you to staff that need to know such information, who assist in providing products and services to you, or who assist in the administration of the office, to maintain confidentiality of your information. Limited access is given to nonaffiliated third parties, as permitted by law, to execute securities transactions on your behalf, or to provide account maintenance or customer service on your accounts.

We may disclose personal information obtained from you to financial services providers that service or provide support to your accounts, as permitted under law, such as:

- RIA custodians
- Third-party administrators and vendors hired to effect, administer, or enforce transactions or services to your accounts

We will not share information about you with nonaffiliated third parties, unless we have provided you with an updated Privacy Notice, along with an opportunity to approve or disapprove of the sharing of your information.

BIP Wealth, LLC is affiliated with BIP Holdings, LLC and BIP Capital, LLC, as we share common ownership.

BIP Wealth, LLC may be required, by law or regulation, to disclose information to third parties such as in response to a subpoena, to prevent fraud, to comply with rules and regulations to which we are subject, in response to inquiries from industry regulators, and to comply with our custodians' policies.

Our Security Procedures

We maintain physical, electronic and procedural safeguards to protect your nonpublic personal information. This includes measures to protect your information during its disposal.

We will affirm our Privacy Policy annually in writing, providing you maintain an on-going relationship with us.

Please call 404.495.5230 or 866.435.8877 if you have follow-up questions regarding the BIP Privacy Policy.