
PURPOSEFUL

financial & legacy planning

PRIVACY POLICY

May 14, 2026

Introduction

Martin Wealth Management, doing business as Purposeful Financial Planning and Purposeful Financial and Legacy Planning, respects your privacy and is committed to protecting your non-public personal information (“NPI”). We place the highest value on the information you share with us, and we will not disclose your personal information to anyone, unless it is required by law or at your direction. We do not sell your personal information. This policy describes how we collect, share, and protect your information, in compliance with Regulation S-P.

Information We Collect

We collect NPI about you to design and implement the investment and financial planning services we provide to you (such as processing transactions, maintaining accounts, and providing investment advice) and to comply with the federal and state laws and regulations that govern us. Types of information collected include:

- **Information from you:** Forms, surveys, or agreements (including your name, address, Social Security Number, date of birth, income, and assets).
- **Information from third parties:** Account custodians, consumer reporting agencies, or other service providers.

Information We Share

We are permitted by law to disclose non-public information about you to unaffiliated third parties in certain circumstances, such as to the following:

- **Service Providers:** As necessary to provide services to you, we must share NPI with our service providers, such as the custodian that holds your investment account, third party investment advisers, or software or web-based application providers.
- **Authorized Representatives:** With your permission, we may share NPI with your authorized representative or power of attorney.
- **Regulatory/Legal:** We may disclose information as permitted or required by applicable federal and state laws, such as to comply with a subpoena or regulatory investigation.

Because we share NPI solely to service your accounts and provide services to you, you cannot opt out of allowing us to share your information. We do not provide your personal information to

mailing list vendors or solicitors. In the event we have a change to our business practices that allow NPI to be shared with other unaffiliated third parties, we will provide you with a revised Privacy Policy, and as required by law. We will notify you in advance if our Privacy Policy changes to allow you the opportunity to opt-out of such disclosure.

Information Protection

Your privacy is of the utmost importance to us. We maintain physical, electronic, and procedural safeguards to protect your NPI and prevent its unauthorized access, disclosure, or use. Access is restricted to firm employees and associates who need the information in order to carry out their business functions and to provide services to you. Before sharing information with unaffiliated third parties, as permitted and as described above, we perform due diligence to review their privacy, confidentiality, and cybersecurity policies, as applicable.

Former Clients

After you cease to be our client, we are required to maintain certain NPI about you to comply with applicable federal and state regulations. Even if we cease to provide you with advisory services, our Privacy Policy will continue to apply to you and we will continue to adhere to the privacy policies and practices described in this notice.

Contact Us

You are encouraged to discuss with us any questions regarding our privacy policies and procedures. You may obtain a copy of our current Privacy Policy by contacting us at (970) 443-1873 or steve@purposefulfinancialplanning.com.