



**WILLIAM
MADISON**
A D V I S O R S

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Privacy Notice

Privacy of our clients' information has always been and will always be of paramount importance to our firm. In fact, we consider strict confidentiality one of the hallmarks of our professional practice. Please read and understand the privacy policies and procedures we have implemented to safeguard your non-public personal information.¹

This notice is being provided to you in accordance with the Securities and Exchange Commission's rule regarding the privacy of consumer financial information. This rule is mandatory for all investment advisers registered with the SEC. We are required by law to send you a notice regarding our Privacy Policy and to notify you should we make any changes to our Privacy Policy.

We collect non-public information about you in the coordination of our services that includes, but is not limited to, name, address, telephone number, tax identification number, date of birth, beneficiary information, investment and risk criteria, and personal financial information related to personal financial planning engagements. We also collect information about your investment transactions and investment account history.

We do not sell any personal information about clients to anyone for any purpose. We do not disclose any non-public personal information about our clients or former clients to anyone, except as permitted or required by law, or as necessary to provide services to you. Listed below are some examples of third parties to whom we may disclose certain non-public personal information in the conduct of our service to you:

- Companies that work with us to provide service with our management efforts, provide account services, or process transactions. This would include, but is not limited to, Charles Schwab & Co. and Carter & Beard, P.C. These firms also maintain privacy policies.
- Parties specifically representing you, such as brokers, attorneys, accountants, auditors, or to other third parties with your specific consent and instruction.
- Other entities required by law, such as in response to a subpoena or other legal process.

William Madison Advisors maintains policies and procedures to safeguard your non-public personal information. Access is restricted to employees who need the information to perform their job duties. Employees are regularly instructed regarding privacy issues. To guard your non-public personal information, we maintain physical, electronic, and procedural safeguards that comply with federal standards.

Please contact us with any questions. We value our relationship with you and appreciate your continued trust.

¹ *Nonpublic personal information means personally identifiable financial information and any list, description or other grouping of consumers that is derived using any personally identifiable financial information that is not publicly available.*