

## **PRIVACY POLICY**

Robertson Stephens Wealth Management, LLC (“RSWM”) respects every individual’s right to the privacy of his or her personal information. We consider our relationship with you, our clients, to be our most valuable asset.

We recognize and strictly adhere to our obligation to keep any information about our clients secure and confidential. We believe it’s important for you to know that we do not share, sell or rent to anyone the information you have entrusted to us. We only permit access to your non-public information to those representatives, employees and affiliates who need to know that information to provide our services to you. We also maintain stringent physical, electronic and procedural safeguards to guard this non-public information.

The information we collect comes from our consultations with you, from publicly available sources, and from documents that you may deliver to us in the course of our relationship with you. We may use this information to provide you with financial advisory services and in doing so, we may share specific information with firms that assist us in providing our services and therefore have a need for such information, as permitted by law. We may also disclose such information to FINRA, the Securities and Exchange Commission, the State of California and other states or regulatory agencies that oversee our activities.

Since it is the policy of RSWM to not share non-public personal and financial information for marketing purposes or with unaffiliated third parties, except as mandated by law, there are no allowances required for clients to opt out.

If the firm, or any of its representatives, terminates its relationship with the other, information that has been disclosed by one to the other may be retained by both parties, if they have so agreed, as a part of a transfer of that portion of the business previously handled by the representative.

If you have questions about this Privacy Policy please contact our Chief Compliance Officer, Michael Curley, at 415-500-6835 or by email at [mcurley@rscapital.com](mailto:mcurley@rscapital.com).

Thank you,

Robertson Stephens Wealth Management, LLC