FACTS

WHAT DOES Bright Wealth Management DO WITH YOUR PERSONAL INFORMATION?

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 assets • account balances and transaction history • risk tolerance and investment experience When you are no longer our customer, we continue to share your information as described in this notice.
How?	All financial companies need to share non-public personal information to run their everyday business. In the section below, we list the reasons financial companies can share their non-public personal information; the reasons Bright Wealth Management chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Bright Wealth Management share?	Can you limit this sharing?
For our everyday business purposes— such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	**Yes**	**No**
For our marketing purposes— to offer our products and services to you	**No**	**We don't share**
For joint marketing with other financial companies	**No**	**We don't share**
For our affiliates' everyday business purposes— information about your transactions and experiences	**Yes**	**No**
For our affiliates' everyday business purposes— information about your creditworthiness	**No**	**We don't share**
For our affiliates to market to you	**No**	**We don't share**
For non-affiliates to market to you	**No**	**We don't share**

Questions?	Call 972.410.6623

Who we are	
Who is providing this notice?	Bright Wealth Management

What we do	
How does Bright Wealth Management 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.
How does Bright Wealth Management collect my personal information?	We collect your personal information, for example, when you • open an account • update your account information • provide us information orally or in writing We may also collect your personal information from others, such as brokerage firms, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only • sharing for affiliates' everyday business purposes—information about your creditworthiness • affiliates from using your information to market to you • sharing for non-affiliates to market to you State laws and individual companies may give you additional rights to limit sharing.

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. Our affiliates include companies with a Bright name: financial companies such as Bright Equities.
Non-affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. • Bright Wealth Management Does NOT share with non-affiliates
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. • Bright Wealth Management does not jointly market

Other important information

Bright Wealth Management
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