

Privacy Policy

Maintaining the trust and confidence of our clients is a high priority. That is why we want you to understand how we protect your privacy when we collect and use information about you, and the steps that we take to safeguard that information. This notice is provided to you on behalf of **Maney Wealth LLC (“Maney Wealth”)**.

Information We Collect

In connection with providing investment advisory services, we obtain non-public personal information about you, including:

- Information we receive from you on account applications and other forms, such as your address, date of birth, Social Security number, occupation, financial goals, assets, and income;
- Information about your transactions with us or others;
- Information about your visits to our website. We store records of activities on our site in web server logs that automatically capture and save information electronically. This information is used to administer the site, analyze usage, protect the website and its content, and improve user experience; and
- Information received from consumer reporting agencies or other third parties, such as credit history or employment status, where applicable.

Categories of Information We Disclose

We may disclose information that we collect in accordance with this policy. Maney Wealth does not sell client lists and will not sell your name to telemarketers.

Categories of Parties to Whom We Disclose Information

We do not disclose information regarding you or your account except under the following circumstances:

- To entities that perform services for us or on our behalf, including financial service providers such as qualified custodians and other service providers supporting investment advisory operations;
- To consumer reporting agencies, where applicable;
- To third parties that provide operational, administrative, technology, compliance, or account-servicing support;
- To your attorney, trustee, or other authorized fiduciary representatives;
- To our attorneys, accountants, or auditors; and
- To government entities or other third parties as required by law, regulation, subpoena, or regulatory inquiry.

How We Use Information

Information may be used by companies that perform support services for us, such as data processing, client relationship management, technology systems consulting, and account administration, for purposes including:

- Protecting client information from unauthorized access or identity theft;
- Processing account requests and transactions;
- Establishing or maintaining accounts with unaffiliated third parties such as qualified custodians;
- Servicing accounts, including issuing statements and billing;
- Complying with federal and state regulatory requirements; and
- Informing clients about advisory services of interest.

Regulation S-AM

Maney Wealth does not receive or use eligibility information from affiliates for marketing solicitations as contemplated under Regulation S-AM.

Our Security Policy

We restrict access to non-public personal information to individuals who require such access to perform their duties. We maintain physical, electronic, and procedural safeguards designed to protect client information.

Cybersecurity

Maney Wealth maintains internal policies and procedures designed to address cybersecurity risks. A copy of this policy is available upon request.

Succession Planning

In the event of retirement, incapacity, or death of the owner(s) of Maney Wealth, client information may be disclosed to an unaffiliated third party solely for purposes of facilitating an orderly business succession. Any change in control would require client consent as required by law and advisory agreements.

Your Right to Opt Out

Federal privacy laws provide clients with the right to restrict certain sharing of personal financial information. Opt-out rights do not apply to disclosures necessary for normal business purposes, including account servicing, legal compliance, and fraud prevention.

You may opt out of certain disclosures by contacting Maney Wealth.

Closed or Inactive Accounts

This Privacy Policy continues to apply to clients whose accounts are closed or inactive.

California Residents – Privacy Rights

California residents may have additional rights under the California Consumer Privacy Act (CCPA) and California Privacy Rights Act (CPRA), including the right to request access, correction, or deletion of personal information, subject to regulatory retention requirements. Maney Wealth does not sell personal information and does not share personal information for cross-context behavioral advertising.

Requests may be submitted using the contact information below. Verification may be required.

Complaints and Contact Information

Please direct privacy-related questions or complaints to:

Dylan Maney
Maney Wealth LLC
2193 Fillmore St., #63
San Francisco, CA 94115
(415) 423-1142

Changes to This Privacy Policy

If we make material changes to this policy, we will notify clients as required by law.