

Vera Financial Solutions, LLC's PRIVACY NOTICE

Vera Financial Solutions values our customers and makes it a top priority to safeguard the confidential information of our customers. We are committed to protecting your privacy and maintaining your trust and confidence.

Vera Financial Solutions collects information about you to assist us in providing services to help you meet your financial goals and objectives and provide high standards of customer service. Additionally, information is obtained from you in order to help us fulfill our legal and regulatory requirements. Information collected may vary depending on the services requested and the scope of your engagement with us.

Information Collected About You

Vera Financial Solutions collects nonpublic personal information about you from the following sources:

- ◆ Information provided on applications and related forms, such as name, address, telephone number, birth date, net worth, annual income, information about your personal finances.
- ◆ Information from your employer, association, or benefit plan sponsor.
- ◆ Information may be obtained such as demographics depending on the services you are requesting from us.

We do not disclose information to nonaffiliated third parties about our current or former customers, except as permitted by law. However, should for any reason our policy change, we will notify you by providing you with an amended Privacy Notice prior to making disclosure of your nonpublic information to nonaffiliated third parties that are not permitted under law.

Policies and Practices to Protect Your Personal Information

We train our staff to take caution in handling personal information. We restrict access to nonpublic information about you to staff that need to know such information, who assist in providing services to you, or who assist in the administration of the office, in order to maintain confidentiality of your information. Further, we limit staff access to information to only those who have a business or professional reason for knowing such information.

If you close your account, cease services with us, or become an inactive customer, we will continue to adhere to the privacy policy disclosed herein, unless we notify you by providing an amended Privacy Notice.

Disclosure of Personal Information

We may disclose personal information obtained from you to financial service providers that service or provide support to your accounts, as permitted under law, such as:

- ◆ Securities broker/dealers.
- ◆ Other investment advisers.
- ◆ Insurance agents and insurance companies.
- ◆ Investment companies.

- ◆ Third-party administrators and vendors hired to effect, administer or enforce transactions or services in your accounts.
- ◆ Consumer reporting agencies in connection with your application or renewal of insurance coverage.

We will not share information about you with nonaffiliated third parties, unless we have provided you with an updated Privacy Notice and provided you with an opportunity to approve or disapprove of the sharing of your information.

Additionally, we may be required by law or regulation to disclose information to third parties such as in response to a subpoena, to prevent fraud, to comply with rules and regulations to which we are subject, in response to inquiries from industry regulators, and in order to comply with our broker/dealer's policies with whom our associated persons may be registered.

We will affirm our Privacy Policy annually in writing, provided you maintain an ongoing relationship with us.

PRIVACY NOTICE ACKNOWLEDGEMENT

_____ (hereinafter referred to as “Client”) hereby acknowledges that Client has received a copy of Vera Financial Solutions, LLC’s (hereinafter referred to as “Investment Adviser”) Privacy Notice.

Should Client have any questions regarding Investment Adviser’s policies and practices for maintaining Client’s personal nonpublic information, Client may contact Megan Taylor at (248) 421-7327.

Date: _____, 20__.

By: _____ *Print Name*

By: _____ *Print Name*