

PRIVACY POLICY

FACTS

What does Intentional, LLC 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.

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 date of birth
 - Account balances and transaction history
 - Investment experience and objectives
 - Income and net worth
-

How?

All investment advisers need to share clients' personal information to run their everyday business. In the section below, we list the reasons we may share your personal information; the reasons Intentional, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information | Does Intentional, LLC share? | Can you limit this sharing?

--- | --- | ---

For our everyday business purposes — such as to process transactions, maintain your account(s), respond to court orders and legal investigations, and comply with applicable laws | **Yes** | **No**

For our marketing purposes — to offer our advisory services to you | **Yes** | **No**

For joint marketing with other financial companies | **No** | We do not share

For our affiliates' everyday business purposes | **Yes** | **No**

For our affiliates to market to you | **No** | We do not share

For non-affiliates to market to you | **No** | We do not share

Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

Who we are

Who is providing this notice?

Intentional, LLC, a registered investment adviser.

What we do

How does Intentional, LLC protect my personal information?

We maintain physical, electronic, and procedural safeguards designed to protect your personal information. These measures include secure systems, restricted access to data, and ongoing monitoring of service providers.

How does Intentional, LLC collect my personal information?

We collect your personal information, for example, when you:

- Open an account
- Provide investment or financial information
- Enter into an advisory agreement

Why can't I limit all sharing?

Federal law gives you the right to limit only certain types of sharing. Limitations do not apply to sharing necessary for everyday business purposes, compliance with legal obligations, or servicing your account.

Additional Information

We may share your personal information with **Raymond James**, our qualified custodian, as well as with other service providers (such as technology vendors, accountants, or compliance consultants) **solely as necessary to provide advisory services and operate our business**. These parties are required to maintain the confidentiality of your information and use it only for authorized purposes.

TEXT MESSAGING AND ELECTRONIC COMMUNICATION

We may communicate with clients and prospective clients through electronic means, including email, secure portals, and text messaging (SMS), when appropriate and permitted by applicable law.

Text messaging is used primarily for administrative, scheduling, and logistical communications. We do not recommend transmitting sensitive personal information, confidential financial data, or account-specific instructions via text message.

While we take reasonable measures to protect the security and confidentiality of electronic communications, text messages may not be secure and may be subject to interception, loss, or unauthorized access. By consenting to receiving text messages from us, you understand that text messaging may not be a secure form of communication.

Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

Clients may opt out of text messaging at any time by notifying us in writing or by replying "STOP" to a text message, where applicable. Opting out of text messaging will not affect your ability to receive services or communicate with us through other means.

We retain electronic communications, including text messages, in accordance with our regulatory recordkeeping obligations.

Mobile Opt in, SMS Consent, and phone numbers collected for SMS communication purposes will not be shared with any third party or affiliates for marketing purposes

SMS Terms & Conditions

1- SMS Consent Communication:

Information (Phone Numbers) obtained as part of the SMS consent process will not be shared with third parties for marketing purposes.

2- Types of SMS Communications:

If consent has been given to receive text messages from Intentional, LLC DBA Prime Wealth Management, messages may be received related to the following:

Appointment reminders

Follow-up messages

Example: Thank you for reaching out to Intentional, LLC DBA Prime Wealth Management. We've received your inquiry and are working on a solution. Our team will update you within [timeframe].

For any further questions, feel free to reply to or contact us at [customer service phone number].

3- Message Frequency:

Message frequency may vary depending on the type of communication. For example, up to 10 SMS messages per week may be received related to appointments/billing, etc.

4- Potential Fees for SMS Messaging:

Standard message and data rates may apply, depending on the carrier's pricing plan. These fees may vary if the message is sent domestically or internationally.

5- Opt-In Method:

Opt-in to receive SMS messages from Prime Wealth Management can be done in the following ways:

They fill out a form.

6- Opt-Out Method:

Opting out of receiving SMS messages can be done at any time by replying "STOP" to any SMS message received. Alternatively, direct contact can be made to request removal from the messaging list.

Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

7- Help:

For any issues, reply with the keyword HELP. Alternatively, help can be obtained directly from us at (240) 8550007 Additional Options:

If SMS messages are not desired, the SMS consent box on forms can be left unchecked.

8- Standard Messaging Disclosures:

Message and data rates may apply.

Opt out at any time by texting "STOP."

For assistance, text "HELP" or visit our Privacy Policy and Terms and Conditions pages.

Message frequency may vary

Definitions

Affiliates

Companies related by common ownership or control. Intentional, LLC does not share personal information with affiliates.

Non-affiliates

Companies not related by common ownership or control. Non-affiliates may include custodians or service providers. Intentional, LLC does not share personal information with non-affiliates for marketing purposes.

Joint marketing

A formal agreement between non-affiliated financial companies to market financial products or services to you. Intentional, LLC does not participate in joint marketing arrangements.