



An SEC Registered Investment Advisor

Privacy Policy

Woodstock Wealth Management, Inc. ("WWM") and its affiliated company, Woodstock Holdings, Inc. (parent company), collects nonpublic personal information about you from the following sources:

- ⌘ Information we receive from you on applications or other forms
- ⌘ Information about your transactions with us or others
- ⌘ Information we may receive from a consumer reporting agency

If you decide to close your account (s) or become an inactive customer, we will adhere to the privacy policies and practices as described in this notice.

WWM restricts access to your personal and account information to those employees who need to know that information to provide products and/or services to you. WWM maintains physical, electronic, and procedural safeguards to guard your nonpublic personal information.

We do not disclose any nonpublic personal information about you to anyone, except as permitted by law.

This policy will remain in effect until further notice.

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WWM Advisory
PP 03/24/23

For your reference, this policy has been posted to our website at www.wwmria.com. If you have any questions or concerns, please contact us via email at advbus@wwmria.com

Relationship With Other Financial Institutions

WWM maintains a contractual agreement with Fidelity Clearing and Custody Solutions to custody and maintain accounts for clients of Woodstock Wealth Management, Inc. It should be noted that Fidelity has similar or identical information that WWM does about their clients. You may view Fidelity's Privacy Policy at www.fidelity.com. WWM serves as solicitor for Third Party Managers and as Advisor of record for various product providers whose Privacy Policies can be accessed from their respective websites. For further information, call 800-279-4468.

Investor Education

Investment Adviser Public Disclosure

Please visit www.adviserinfo.sec.gov