Partnership Wealth Management, LLC's
California Privacy Notice

Effective Date: September 1, 2026

This Privacy Notice for California Residents supplements the information contained in our primary Privacy Policy and applies solely to all visitors, users, and others who reside in the State of California. We adopt this notice to comply with the California Consumer Privacy Act of 2018 (CCPA) and the California Privacy Rights Act (CPRA).

1. Information We Collect

We collect information that identifies, relates to, describes, or is reasonably capable of being associated with a particular consumer or device. Within the last 12 months, we have collected the following categories of personal information:

- **Identifiers:** Real name, alias, postal address, email address, phone number, or account name.
- **Customer Records (Cal. Civ. Code § 1798.80(e)):** Name, signature, social security number, physical characteristics, address, telephone number, passport number, driver's license, insurance policy number, education, employment, bank account number, or credit card number.
- **Commercial Information:** Records of personal property, products or services purchased, obtained, or considered.
- **Internet/Electronic Network Activity:** Information on a consumer's interaction with a website, application, or advertisement.

2. Sources of Personal Information

We obtain the categories of personal information listed above from the following categories of sources:

- Directly from you (e.g., from forms you complete or products you purchase).
- Indirectly from you (e.g., from observing your actions on our Website).
- Third-party service providers (e.g., data analytics providers).

3. Use of Personal Information

We may use or disclose the personal information we collect for one or more of the following business purposes:

- To fulfill or meet the reason you provided the information.
- To provide, support, personalize, and develop our Website, products, and services.
- To process your requests, purchases, transactions, and payments.
- To respond to law enforcement requests and as required by applicable law.

4. Sharing Personal Information (Sales and Shares Disclosure)
In the preceding 12 months, Partnership Wealth Management, LLC. has not "sold" or "shared" personal information for cross-context behavioral advertising.

- You have the right to opt-out of the sale or sharing of your personal information by contacting us via the phone number or address listed below.

5. Your Rights Under the CCPA/CPRA
California residents hold specific rights regarding their personal information:

- **Right to Know/Access:** You have the right to request that we disclose what personal information we collect, use, disclose, and sell.
- **Right to Delete:** You have the right to request the deletion of your personal information, subject to certain exceptions.
- **Right to Correct:** You have the right to request that we correct inaccurate personal information that we maintain about you.
- **Right to Opt-Out of Sale or Sharing:** You can direct businesses that sell or share personal information to stop doing so.
- **Right to Limit Use of Sensitive Personal Information:** You can request that we limit our use of sensitive personal data to necessary operational services.
- **Right to Non-Discrimination:** We will not discriminate against you for exercising any of your CCPA/CPRA rights.

6. Exercising Your Rights
To exercise your rights to know, delete, or correct, please submit a verifiable consumer request to us by either:

- **Calling us at:** 410-732-2633
- **Visiting or mailing us at:** 606 E. Joppa Road, Towson, MD 21286

Only you, or a person registered with the California Secretary of State that you authorize to act on your behalf, may make a verifiable consumer request related to your personal information.
