Rev. November 1, 2023

FACTS	WHAT DOES ROPES WEALTH ADVISORS 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. Please read this notice carefully to understand what we do.
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 • Name, address, and driver's license number • Assets, income, property address and value • Financial information, account balances, and insurance policy information • Account transactions, retirement assets, checking account information, wire transfer instructions, and risk tolerance
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons Ropes Wealth Advisors chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Ropes Wealth Advisors share?	Can you limit this sharing?
For our everyday business purposes— such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes— to offer our products and services to you	Yes	Yes
For joint marketing with other financial companies	No	NA
For our affiliates' everyday business purposes— information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes— information about your creditworthiness	No	NA
For our affiliates to market to you	No	NA
For non-affiliates to market to you	No	NA

Questions?	• Call 1-857-255-2100

Who we are	
Who is providing this notice?	Ropes Wealth Advisors, a division of RWA Wealth Partners, LLC

What we do	
How does Ropes Wealth Advisors protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does Ropes Wealth Advisors collect my personal information?	We collect your personal information, for example, when you: • Ask about or buy one of our products or services; or • Fill out forms, or conduct business transactions with us.
Why can't I limit all sharing?	Federal law gives you the right to limit only: • Sharing for affiliates' everyday business purposes—information about your creditworthiness • Affiliates from using your information to market to you • Sharing for non-affiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your right under state law.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account - unless you tell us otherwise.

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and non-financial companies. Our affiliates include: • *RWA Wealth Partners, LLC* • *RWA Tax Solutions, LLC*
Non-affiliates	Companies not related by common ownership or control. They can be financial and non-financial companies.
Joint marketing	A formal agreement between non-affiliated financial companies that together market financial products or services to you.