Rev 02.18.2022

FACTS	WHAT DOES BRASS TAX WEALTH MANAGEMENT, INC. DO WITH YOUR PERSONALINFORMATION?
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 and income • Account balances and payment history • Credit history and credit scores
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 we choose to share; and whether you can limit this sharing.

Reasons we can share your personal information	Do we 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 Supervising Broker/Dealers who have regulatory authority to supervise Brass Tas Wealth Management, Inc.	YES	NO
For our marketing purposes— to offer our products and services to you	NO	N/A
For joint marketing with other financial companies	NO	N/A
For our affiliates' everyday business purposes— information about your transactions and experiences	YES	YES
For our affiliates' everyday business purposes— information about your creditworthiness	YES	YES
For our affiliates to market to you	NO	N/A
For non-affiliates to market to you	NO	YES

To limit our sharing	• Mail the form below **Please note:** If you are a *new* customer, we can begin sharing your information from the date you received this notice. When you are *no longer* our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.
Questions?	Call 513-791-4575

Who we are	
Who is providing this notice?	Brass Tax Wealth Management, Inc., also known as Brass Tax Wealth Management, Schulte Financial Group, and Storen Financial Advisory Group

What we do

How does Brass Tax Wealth Management, Inc. 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 Brass Tax Wealth Management, Inc. collect my personal information?	We collect your personal information, for example, when you • Open an account or deposit money
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.
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 nonfinancial companies. • Schulte & Uhrig CPAs
Non-affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. • LPL Financial, LLC • Storen Tax & Financial, Inc.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

Other important information

Mail in Form

<table>
<tr><td rowspan="5">If you have a joint account, your choice(s) will apply to everyone on your account unless you mark below.

☐ Apply only to me</td><td colspan="2">Mark any you want to limit:
☐ Do not share information about my creditworthiness with your affiliates for their everyday business purposes.
☐ Do not allow your affiliates to use my personal information to market to me.
☐ Do not share my personal information with non-affiliates to market their products and services to me.</td></tr>
<tr><td>Name:</td><td rowspan="4">Mail to:
Brass Tax Wealth Management, Inc.
4755 Cornell Road
Cincinnati, OH 45241</td></tr>
<tr><td>Address:</td></tr>
<tr><td>City: State: Zip:</td></tr>
<tr><td>Account #:</td></tr>
</table>