

Net Worth Advisory Group is committed to protecting the confidentiality, integrity, and security of our clients' personal information. We adhere to regulation standards for the protection and security of our clients' confidential information and collect and record client/investor information in order to best meet client service requirements, fiduciary obligations, and to comply with legal and regulatory requirements. Net Worth Advisory Group collects, records, and retains the following types of forms that contain personal and financial data:

- Client/Investor Profiles
- Client/Investor Questionnaires
- Investment Policy Statements
- Account Applications
- Subscription Documents.
- Trust and Organizational Records and other documents used to conduct due diligence.
- Other documentation.

Because this data contains nonpublic client/investor information, it is subject to every available protection under this policy. Access to the completed documents and client/investor files are restricted to following persons:

- Only those associated persons who are required by their job function to access this information.
- Applicable staff, such as individuals in management, legal or compliance departments in cases where the information is requested to resolve a customer dispute.
- Management, legal and compliance personnel in cases where such information is requested by a regulatory agency.
- Third party affiliates such as broker/dealers, custodians, or other client service providers
- Others as specifically permitted by the CCO.

Finally, we have policies and procedures in place that we believe are reasonably designed to protect the security and confidentiality of client information including non-disclosure and confidentiality agreements, password protected systems, protection and offsite backup of computer systems, and ongoing training of employees and affiliates.