



Privacy Notice

June 1, 2026

Our Commitment to Your Privacy

We are committed to maintaining the confidentiality, integrity, and security of your personal financial information. Protecting your nonpublic personal information (NPI) is a fundamental part of the trust you place in us, and we take that responsibility seriously.

Information We Collect

While providing investment advisory services, we may collect the following types of NPI:

- Information you provide directly, such as name, address, Social Security number, date of birth, employment information, and financial account details;
- Financial information, including assets, income, net worth, investment objectives, and risk tolerance;
- Account and transaction information, including account balances, positions, and transaction history; and
- Information from third parties, such as custodians, accountants, or attorneys, in connection with providing services to you.

How We Use and Share Your Information

We do not sell your NPI. We do not share your NPI with nonaffiliated third parties for their own marketing purposes.

We may share your NPI only in the following limited circumstances:

- Service providers: We share NPI with nonaffiliated third parties — such as custodians, attorneys, accountants, auditors, and technology providers — as necessary to provide services to you or to operate our business. All such service providers are contractually required to protect your NPI and may not use it for purposes other than those for which it was disclosed.
- Legal and regulatory requirements: We may disclose NPI as required or permitted by law, including to regulators, courts, or law enforcement.
- With your consent: We may share NPI for other purposes with your prior written authorization.

We do not have affiliates that share in client information.

Your Opt-Out Rights

You have the right to opt out of certain disclosures of your NPI to nonaffiliated third parties. However, we do not share your NPI with nonaffiliated third parties in any manner that would give rise to an opt-out right. Accordingly, no opt-out election is required or applicable at this time.

If our information-sharing practices change in a way that creates opt-out rights, we will notify you and provide an opportunity to opt out before implementing those changes.

How We Protect Your Information

We maintain a comprehensive Written Information Security Program ("WISP") designed to protect your NPI from unauthorized access, use, disclosure, alteration, or destruction. Our safeguards include:

- Administrative safeguards, including employee training, access controls, and vendor oversight;
- Technical safeguards, including encryption of NPI at rest and in transit, multi-factor authentication, and secure email protocols; and
- Physical safeguards, including locked storage of physical records and controls over physical access to offices and devices.

Access to your NPI is limited to those personnel who need it to provide services to you.

Security Incidents and Breach Notification

We maintain a written Incident Response Program. In the event of an unauthorized access to or acquisition of your NPI that creates a reasonable risk of substantial harm, we will notify you as promptly as practicable, and in no event later than 30 days after we become aware of the incident, as required by applicable law.

Any such notification will describe the nature of the incident, the type of information involved, steps we have taken to address it, and actions you may take to protect yourself.

Disposal of Your Information

When NPI is no longer needed, we dispose of it in a manner designed to prevent unauthorized access. Paper records are shredded or destroyed by a certified document destruction service. Electronic records and media are securely wiped or destroyed before disposal or repurposing.

Former Clients

We provide the same level of privacy protection to the NPI of former clients as we do to current clients. The practices described in this notice apply equally to information we retain about individuals who are no longer clients of the Firm.

Annual Privacy Notice

We are required to provide this notice to you annually as long as you are a client of the Firm. We will deliver this notice electronically or by mail consistent with your preferences and applicable law. If our privacy practices change materially, we will provide you with a revised notice.

Contact Us:

Western Pacific Wealth Management, LP
Chief Compliance Officer
263 Market Square Suite B
Lake Forest, IL 60045
847.987.8015
bandersen@westpacwm.com