

Privacy Policy Notice

Rev. March 2026

FACTS	WHAT DOES AVID WEALTH PARTNERS, LLC (“AVID”) DO WITH YOUR FINANCIAL INFORMATION?
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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.
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What?	<p>The types of personal information we collect, and share depends on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> • Social Security number and income • Account balances and assets • Transaction history
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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 Avid chooses to share; and whether you can limit this sharing.
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Reasons we can share your personal information	Does Avid 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	No
For joint marketing with other financial companies	No	Not Applicable
For our affiliates’ everyday business purposes – information about your transactions and experiences if you have engaged them	Yes	No
For our nonaffiliates’ everyday business purposes	Yes	Yes
For our affiliates to market to you	No	Not Applicable
For nonaffiliates to market to you	No	Not Applicable

Questions?	Call (210) 864-3333 and ask for our Chief Compliance Officer
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Who we are	
Who is providing this notice?	Avid Wealth Partners, LLC

What we do	
How does Avid Wealth Partners, LLC 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 Avid Wealth Partners, LLC collect my personal information?	<p>We collect your personal information, for example, when you</p> <p>Provide your personal information</p> <p>Seek Investment Advice</p> <p>Complete an Application</p> <p>Our affiliates may also collect your personal information from other sources, such as credit bureaus, affiliates, or other companies.</p>
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only.</p> <p>Sharing for affiliates' everyday business purposes- information about your creditworthiness</p> <p>Affiliates from using your information to market to you</p> <p>Sharing for non-affiliates to market to you</p> <p>State laws and individual companies may give you additional rights to limit sharing.</p>
How can I limit or opt-out of sharing with nonaffiliates?	You can contact our office at any time to limit sharing or opt-out.

Definitions	
Affiliates	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> • Avid Consulting, LLC • Avid Risk Management, LLC • Avid Capital, LLC
Nonaffiliates	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <p>Avid Wealth Partners, LLC shares with non- affiliates for everyday business purposes so we can offer you their services.</p>
Joint Marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <p>Avid Wealth Partners, LLC does not jointly market.</p>