



## Privacy Notice

Updated May 2026

**MAI dba Moneywatch Advisors** collects non-public personal information about you, our client, from the following sources:

- Information provided on government issued forms of identification
- Information we receive from you on applications and other forms
- Information about your transactions from the firms that have custody of your assets (Financial Service Providers, Charles Schwab, etc.)
- Information we receive from outside affiliates with whom you have a relationship, i.e. retirement plans (this only applies if you have given the affiliate permission to provide us with that information)

**Moneywatch Advisors** collects the following types of personal information:

- Social security number
- Date of birth
- Driver's license number, state of issuance and date of expiration, passport number
- Telephone number
- Physical address
- Email address
- Banking information
- Employer information

**Moneywatch Advisors** does not disclose any non-public personal information about our existing or former clients to anyone, except as permitted by law and at your request

**Moneywatch Advisors** may disclose non-public personal information about you to the following type of third party:

- Financial service providers that you have authorized, particularly Charles Schwab
- Third party software providers (Advyzon, Junxure, ByAllAccounts)

Privacy Policies of third-party software providers are reviewed annually.

**Moneywatch Advisors** restricts access to non-public personal information. Moneywatch employees are able to access your personal information when providing our business services

to you. We maintain physical, electronic, and procedural safeguards to protect your non-public personal information. This includes restricted access to our office, restricted access to our files, password-only access to our computers, and password-only access to our software. All access to personal information by employees is for business purposes only. All employees are required to safeguard such information. Client information is never released to third parties for marketing purposes.

**Moneywatch Advisors** has established an Information Security Program & Identity Theft Prevention Program designed to detect, prevent, and mitigate information and identity theft (updated annually in September).

**Moneywatch Advisors** is required to provide notice if unauthorized access to or use of client information has occurred or is reasonably likely to have occurred. This notice must be provided to clients no later than 30 days after becoming aware of unauthorized access.

Our code of ethics is updated annually in January and is available on request.

**We encourage you to safeguard your personal information and never provide third parties with personal information without first verifying the validity of such requests. This includes replying to phishing attempt emails.**

For any questions or further information regarding this policy, please contact Chelsea at [chelsea@moneywatchadvisors.com](mailto:chelsea@moneywatchadvisors.com).