

FACTS**WHAT DOES Buckingham Strategic Wealth, LLC, & Buckingham Strategic Partners, LLC (Collectively, Buckingham Wealth Partners)****DO WITH YOUR PERSONAL INFORMATION?****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 transaction history
- Assets, investment experience, risk tolerance, and account transactions
- Retirements assets, checking account information, and employment information
- Payment history

When you are *no longer* our customer, we continue to share your information as described in this notice.

How?

All financial companies need to share customer's personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customer's personal information; the reasons Buckingham Wealth Partners chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Buckingham Wealth Partners 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	We don't share
For our affiliates' everyday business purposes— information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes— information about your creditworthiness	No	We don't share
For nonaffiliates to market to you	No	We don't share

Questions?

Call [1. 800.711.2027] or for Buckingham Strategic Wealth Client's go to [\[https://buckinghamadvisor.com/\]](https://buckinghamadvisor.com/), for Buckingham Strategic Partners go to [\[https://www.bamadvisorservices.com/\]](https://www.bamadvisorservices.com/) or [\[https://loringward.com/\]](https://loringward.com/)

Who we are

Who is providing this notice?

Buckingham Strategic Wealth, LLC and Buckingham Strategic Partners, LLC (Collectively Buckingham Wealth Partners)

What we do

How does Buckingham Wealth Partners 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 Buckingham Wealth Partners collect my personal information?

We collect your personal information, for example, when you

- enter into an investment advisory contract or service agreement
- open an account or give us your income information
- tell us about your investment or retirement portfolio or deposit money
- seek financial advice, tax advice or investment advice
- provide employment information
- provide account information
- give us your contact information or pay us via a check
- make a wire transfer or money movement authorization
- share your government-issued ID or your driver's license

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 nonaffiliates to market to you

State laws and individual companies may give you additional rights to limit sharing. [See below for more on your rights under state law.]

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- *Our affiliates include Focus Operating, LLC, Buckingham Strategic Wealth, LLC and Buckingham Strategic Partners, LLC.*

Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- *Buckingham Wealth Partners does not share with nonaffiliates so they can market to you.*

Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- *Buckingham Wealth Partners does not jointly market.*

Other important information

- If you are a California resident, California law may provide you with additional rights regarding our use of your personal information. To learn more about your California privacy rights under the California Consumer Privacy Act (CCPA), visit the [CCPA Privacy Notice](#).
- If you have questions please call our compliance department at (800) 711-2027 or go to our website at <http://buckinghamadvisor.com/>.