



Privacy Policy for Winged Wealth Management and Financial Planning LLC April 2026

Winged Wealth Management and Financial Planning LLC recognizes that our relationships with current and prospective clients are based on integrity and trust. We place the highest value on the information you share with us and work hard to maintain your privacy. Accordingly, WWMFP will not disclose your personal information unless it is required by law or at your direction, nor will we sell your personal information.

Why We Collect Your Information

We gather information so we can:

- Comply with the Federal and State laws and regulations that govern us.
- Help design and implement the investment and planning-related services we provide you

What Information We Collect and Maintain

We may collect and store the following types of “nonpublic personal information” about you:

- Information we collect from you, such as your name, address, social security number, date of birth, and financial information.
- Work product we generate to service your financial needs.
- Information we may receive from third parties with respect to your financial profile.

How We Protect Your Personal Information

Privacy is of the utmost importance to WWMFP. We restrict and limit access to client information only to those who need to carry out their business functions. We educate employees about safeguarding client information and preventing its unauthorized access, disclosure, or use. Employees are required to acknowledge their acceptance and understanding of the privacy policy in writing. We maintain physical, electronic, and procedural safeguards to protect your confidential personal information.

What Information We Disclose

We are permitted by law to disclose nonpublic information about you to unaffiliated third parties to better serve you. For example, we may disclose necessary personal information in limited circumstances to various service providers, such as our clearing firm or independent contractors hired by WWMFP. Arrangements with companies or independent contractors not affiliated with WWMFP are subject to confidentiality agreements.

If Your Advisor Leaves the Firm

If the Financial Planner/Financial Adviser leaves Winged Wealth Management and Financial Planning LLC to join another firm, he or she may be permitted to retain copies of client information so that they can assist with the transfer of accounts to, and service at, their new firm.



“Opting-in” for Third-Party Disclosures: To allow your Financial Planner/Financial Adviser to retain copies of your sensitive information when he or she leaves us to join another firm, contact us at 850-739-0331.

Winged Wealth Management and Financial Planning LLC will not disclose any personal information about you or your account(s) unless one of the following conditions is met:

- We receive your prior written consent; or
- We have documentation that the recipient is your authorized representative; or
- We are required by law to disclose information to the recipient

SMS Data Compliance: No mobile information will be shared with third parties/affiliates for marketing/promotional purposes. All other categories exclude text messaging originator opt-in data and consent; this information will not be shared with any third parties