

FACTS

WHAT DOES GIBRALTAR WEALTH MANAGEMENT, LLC 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
- Investment experience and risk tolerance
- Assets and transaction history

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 Gibraltar Wealth Management chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Gibraltar Wealth Management, LLC 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 management 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	NO	WE DON'T SHARE
For our affiliates' everyday business purposes— information about your creditworthiness	NO	WE DON'T SHARE
For our affiliates to market to you	NO	WE DON'T SHARE
For nonaffiliates to market to you	NO	WE DON'T SHARE

QUESTIONS?

Contact Gibraltar Wealth Management, LLC at 215-956-5154 or visit our website at www.gibraltarwealth.com

Who we are

Who is providing this notice?

Gibraltar Wealth Management, LLC

What we do

How does Gibraltar Wealth Management 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 Gibraltar Wealth Management LLC collect my personal information?

We collect your personal information, for example, when you

- open an account or give us information for our agreement for services contract.

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.

What happens when I limit sharing for an account that I hold jointly with someone else?

Your choices will apply to everyone on your account.

Definitions

Affiliates

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

- Gibraltar Wealth Management, LLC has no affiliates

Nonaffiliates

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

- Gibraltar Wealth Management, LLC does not share with nonaffiliates

Joint marketing

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

- Gibraltar Wealth Management, LLC does not jointly market

Other important information