

# FACTS

## WHAT DOES Tanara Wealth Management, LLC ("Tanara") 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 date of birth
- account balances and transaction data
- assets and income and net worth

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

| Reasons we can share your personal information                                                                                                                                              | Does Tanara Wealth Management share? | Can you limit this sharing? |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------|-----------------------------|
| <b>For our everyday business purposes—</b><br>such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus | YES                                  | NO                          |
| <b>For our marketing purposes—</b><br>to offer our products and services to you                                                                                                             | YES                                  | NO                          |
| <b>For joint marketing with other financial companies</b>                                                                                                                                   | NO                                   | N/A                         |
| <b>For our affiliates' everyday business purposes—</b><br>information about your transactions and experiences                                                                               | NO                                   | N/A                         |
| <b>For our affiliates' everyday business purposes—</b><br>information about your creditworthiness                                                                                           | NO                                   | N/A                         |
| <b>For nonaffiliates to market to you</b>                                                                                                                                                   | NO                                   | N/A                         |

### Questions?

Call 801-653-0654 or go to [tanarawealthmanagement.com](https://tanarawealthmanagement.com)

## Who we are

### Who is providing this notice?

Tanara Wealth Management LLC DBA Tanara Family Offices ("Tanara")

## What we do

### How does Tanara 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.

We also limit access to information by authorized personnel.

### How does Tanara collect my personal information?

We collect your personal information, for example, when you

- open an account or provide account information
- enter an advisory contract or direct us to buy/sell securities
- We also collect your personal information from other companies.

### 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.

## Definitions

### Affiliates

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

- Tanara does not share with affiliates so they can market to you.

### Nonaffiliates

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

- Nonaffiliates with whom Tanara shares your information for the reasons identified above include custodians, legal and other professional advisors, and technology service providers.

### Joint marketing

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

- Tanara Wealth Management LLC does not jointly market.

## Other important information

We may collect limited information through cookies and similar technologies to improve website functionality. This information does not personally identify you. We reserve the right to change this notice and will provide updates as required by law.

In accordance with California law (to the extent applicable), we will not disclose information we collect about you with companies outside of Tanara, except as the law allows. For example, we may disclose information to service your accounts or to process your transactions.