SIMA Wealth Partners, LLC
Privacy Notice

This notice is being provided to you in accordance with the Securities and Exchange Commission's rule regarding the privacy of consumer financial information ("Regulation S-P") and analogous state regulations. Please take the time to read and understand the privacy policies and procedures that we have implemented to safeguard your nonpublic personal information.

INFORMATION WE COLLECT

SIMA Wealth Partners, LLC (SIMA Wealth) must collect certain personally identifiable financial information about its customers to provide financial services and products. The personally identifiable financial information that we gather during the normal course of doing business with you may include:

- information we receive from you on applications or other forms;
- information about your transactions with us, our affiliates, or others;
- information we receive from a consumer reporting agency.

INFORMATION WE DISCLOSE

We do not disclose any nonpublic personal information about our customers or former customers to anyone, except as permitted or required by law, or as necessary to provide services to you. In accordance with Section 248.13 of Regulation S-P, we may disclose some, or all of the information we collect, as described above, to certain nonaffiliated third parties such as portfolio management software providers, reporting software providers, client relationship management software providers, accounting firms that conduct custody exams, compliance consultants that provide compliance exams and assist us with regulatory filings, broker dealers, custodians and other service providers that help us serve our clients and manage their portfolios. We enter into contractual agreements with all nonaffiliated third parties that prohibit such third parties from disclosing or using the information other than to carry out the services for which we disclose the information. Clients should note that our reliance on such unaffiliated third parties is essential, without whom it would be impossible to serve our clients.

The unaffiliated third parties to whom we disclose this information include:

- Microsoft Office (email and archival software)
- cPaperless, LLC (safesend – secure document delivery software)
- Tamarac Envestnet (customer relationship management and archival software)
- Riskalyze, Inc. (risk analysis software)
- eMoney Advisor, LLC (financial planning software)
- RIA Compliance Concepts (Compliance Consultant)

From time to time, these unaffiliated service providers may change or merge with other companies. Updated information regarding any changes will be provided on an annual basis.

QUESTIONS

If you have questions about this privacy notice or about the privacy of your customer information call our main number 804.285.5700 and ask to speak to the Chief Compliance Officer. You can also write us at 1912 E Broad Street · Richmond · Virginia · 23223