

Monies Wealth LLC

Privacy Notice

Registered Investment Adviser · State of Texas · CRD #327872
Effective Date: November 25, 2024 · Last revised: September 10, 2026
Issued annually in accordance with Regulation S-P and the Gramm-Leach-Bliley Act

Your privacy is important to us. Monies Wealth LLC does not sell your personal information to anyone, and does not share it except as necessary to service your account or as required by law.

1. Scope

This Privacy Notice applies to all current and former clients of Monies Wealth LLC ("Monies Wealth," "we," or "us"), a registered investment adviser in the State of Texas. It describes how we collect, use, protect, and share nonpublic personal information ("NPI") in accordance with Regulation S-P and the Gramm-Leach-Bliley Act of 1999 (GLB Act).

2. Information We Collect

We collect NPI that you provide to us directly and that we obtain in the course of providing advisory services, including:

- Name, address, telephone number, and email address
- Financial information including income, assets, liabilities, investment goals, and risk tolerance
- Account information and transaction history
- Information provided orally, in writing, or electronically in connection with your advisory relationship

3. How We Use Your Information

We use NPI solely for the following purposes:

- To provide investment advisory and financial planning services to you
- To maintain required books and records under applicable law
- To communicate with you regarding your account and our services
- To comply with federal and state laws and regulations

4. Information We Share

We do not sell your NPI. We may share your NPI only in the following limited circumstances:

- With service providers (e.g., custodians, account reporting services) under contractual confidentiality obligations, solely to service your account
- With regulatory and self-regulatory authorities as required by law
- With mutual fund companies or insurance companies to execute your investment or insurance transactions

We do not share your NPI with unaffiliated third parties for marketing purposes.

5. Security

Monies Wealth maintains physical, electronic, and procedural safeguards to protect your NPI. Access to NPI is restricted to personnel who need it to service your account.

6. Your Rights and How to Contact Us

You have the right to review the NPI we maintain about you and to request corrections. If you have questions about this Privacy Notice or wish to review your information, please contact us:

Firm	Monies Wealth LLC
Address	2520 South Interstate 35, Ste 102, Austin, TX 78704
Phone	512-730-1609
Email	drgulseren@monieswealth.com
CCO	Dr. Gülseren Mutlu, PhD — Chief Compliance Officer

7. Changes to This Notice

We may update this Privacy Notice as required; the current version is always available at www.monieswealth.com.

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