

CYPRESS POINT WEALTH MANAGEMENT, LLC

PRIVACY NOTICE Rev. 03/2025

FACTS	WHAT DOES CYPRESS POINT WEALTH MANAGEMENT, LLC (CYPRESS POINT) DO WITH YOUR PERSONAL INFORMATION?	
Why?	Financial companies choose how they share your personal information. Federal law gives you 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?	<p>The types of personal information we collect and share can include:</p> <ul style="list-style-type: none">• Social Security Number and Date of Birth• Account Balances and Account Transactions• Assets• Investment Experience• Wire Transfer Instructions <p>We may share your personal information with our accountants and attorneys, as well as with custodians and transfer agents that facilitate in-kind distributions of portfolio securities. Any service provider receiving personal information will be authorized to use such information only to perform the services required and as permitted by applicable law</p>	
How?	All financial companies need to share clients’ personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients’ personal information; the reasons Cypress Point chooses to share; and whether you can limit this sharing.	
Reasons we can share your personal information:Do we share?Can sharing be limited?		
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
Marketing purposes, to offer our products and services to you.	No	We do not share
Joint marketing with other financial companies.	No	We do not share
Our affiliates’ everyday business purposes. This includes information about your transactions.	Yes	No
Non-affiliates to market to you.	No	We do not share
Questions?	Call 214-736-8887 or e-mail sboyd@cypress-wealth.com	

Who we are	
Who is providing this notice?	Cypress Point Wealth Management, LLC (Cypress Point)
What we do	
How does Cypress Point 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 Cypress Point collect my personal information?	<ul style="list-style-type: none"> • Information we receive from you through subscription booklets and other documents, such as name, address, SSN, EIN, assets, income, and amounts or types of your investments • Information about your transactions with us and others, such as your capital account balance, other account data, and participation in other investments
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only:</p> <ul style="list-style-type: none"> • Sharing for affiliates' everyday business purposes—information about your creditworthiness • Affiliates from using your information to market to you • Sharing for non-affiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing.</p>
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.
Non-affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
Joint Marketing	A formal agreement between non-affiliated companies that together market financial products or services to you.
Other important information	