

Clearview Wealth Management Privacy Policy Notice

Clearview Wealth Management is required by law under the privacy provisions of the Gramm-Leach-Bliley Act to protect your privacy. This notice is to inform you of our privacy policy, particularly with respect to the nonpublic personal information we collect about you, and how we use it.

What information we collect:

We may collect nonpublic personal information about you from the following sources:

- Information we receive from you on applications and other account forms such as your name, address, social security number and tax ID number, account number, assets.
- Information about your transactions with us and with service providers, such as your account balance, investments, transaction history, and income earned on investments.

What information we disclose:

In certain circumstances, we are permitted under law to disclose nonpublic personal information about you to persons and entities not affiliated with Clearview Wealth Management. For example, we may disclose nonpublic personal information about you to third party financial service providers to assist in servicing your account with us (such as custodians that hold your securities, cash, and are responsible for fund transfers, tax preparers or any other interested party used to service your account). We may also disclose such information in response to a court order, or as otherwise required by law. We do not disclose nonpublic personal information to nonaffiliated third parties for marketing purposes.

Security Procedures:

We restrict access to nonpublic personal information about you to our associates and to those service providers who require that information in order to provide products or services to you. We maintain physical, electronic, and procedural safeguards which comply with industry standards to guard your nonpublic information.

Clearview Wealth Management Proxy Voting Policy

Clearview Wealth Management (the Firm) has adopted and implemented policies and procedures that we believe are reasonably designed to ensure that proxies are voted in the best interest of the client, in accordance with our fiduciary duties and SEC rule 206(4)-6 under the Investment Advisors Act of 1940. The Firm generally votes in a manner consistent with Board recommendations. However, because we vote proxies in a manner we believe to be in the best interest of our clients, we do vote against the advice of the company management on occasion.

Clearview Wealth Management Proxy Voting Notice

Procedure:

Unless instructed otherwise by our client, custodians (Charles Schwab & Company, Fidelity Investments and National Advisors Trust) are directed to forward domestic company proxy material to Clearview Wealth Management (the Firm). Proxy materials are reviewed and voted following parameters established by the Firm that the Firm believes meets its fiduciary responsibility to the client. All voting is done electronically.

Recordkeeping:

In accordance with amendments to Advisers Act Rule 204-2, the Firm maintains the following:

1. A copy of these policies and procedures.
2. Proxy statements received regarding client securities.
3. A record of each vote cast.
4. A copy of any material that was important in casting the vote.
5. Each written client request for proxy voting records and written response to each request.

Proxy records are maintained in accordance with retention parameters required by the state of North Carolina Securities Division. Clients may request a copy of these policies and procedures, which may be updated periodically, or a record of how proxies were voted by contacting our firm at 704-837-4317.

ADV Notice

To comply with North Carolina regulatory requirements, we make a copy of our Part 2A firm brochure after it is updated no later than 31 March of each year. Notice of this is delivered electronically or, if you do not have an email address, by U.S. Post. If you would like to see the brochure sooner, you may view the entire ADV under the governance section of our website. You can also view it by selecting the *Individual Investor* at www.finra.org and following prompts for FINRA BrokerCheck and then Investment Advisor Search.