



PRIVACY NOTICE AND CLIENT CONSENT

BerganKDV considers the protection of personal information to be a foundation of customer trust and a sound business practice. We employ physical, electronic and procedural controls in order to protect client confidentiality. We may use personal information about you to assist us in completing your financial plan, completing transaction or account changes, and to maintain or service your account. At BerganKDV we will always restrict access to personal information to those who require it to provide products or services to you. The only time we will provide any information about you or your financial information is with your express, written consent as required by law.

HOW WE MANAGE AND PROTECT YOUR PERSONAL INFORMATION

We do not sell information about current or former clients to third parties, nor is it our practice to disclose such information to third parties unless requested to do so by a client or client representative or, if necessary, in order to process a transaction, service an account or as permitted by law. Additionally, we may share information with outside companies that perform administrative services for us. However, our contractual arrangements with these service providers require them to treat your information as confidential.

In order to protect your personal information, we maintain physical, electronic and procedural safeguards to protect your personal information. Our Privacy Policy restricts the use of client information and requires that it be held in strict confidence.

CLIENT NOTIFICATIONS

We are required by law to annually provide a notice describing our privacy policy. In addition, we will inform you promptly if there are changes to our policy. Please do not hesitate to contact us with questions about this notice.

As a full service investment advisor, when appropriate, BerganKDV works closely with BerganKDV, Ltd. and ValMark Securities, LLC (“ValMark”) to help our clients maximize all opportunities available to them to improve their position relative to future and current financial wellbeing. BerganKDV, Ltd provides accounting, tax and auditing services. ValMark is a broker dealer through which BerganKDV Wealth Management may offer insurance products and securities to clients based on the information provided by BerganKDV. BerganKDV may share information for the following purposes:

- Share credit reports, financial or personal information from applications, or information from other sources with only companies within the family of companies affiliated with BerganKDV.
- Share information with unaffiliated companies or persons so that they may offer products or services related to investment management or financial planning.

OPT OUT PROVISION

If you wish us to stop sharing your information, please contact us by:

- Calling us toll-free at 888-812-3533 or,
- Emailing us at contact@lifewiseadvisors.com or,
- Mailing us at: **Lifewise/BerganKDV Wealth Management, LLC**
3800 American Blvd. W, Suite 1000

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