

Privacy Policy Notice

Rev. February 05, 2026

Rev: February 06, 2023

FACTS		WHAT DOES FINANCIAL LIFE ADVISORS, LLC DO WITH YOUR FINANCIAL INFORMATION?	
Why?	Financial companies choose how they share your personal information. Federal law gives consumers 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?	The types of personal information we collect and share depends on the product or service you have with us. This information can include: <ul style="list-style-type: none">▪ Social Security number and income▪ Account balances and assets▪ Transaction history		
How?	All financial companies need to use customers' personal information to run their everyday business. In the section below, we list the reasons financial companies may use customers' personal information, the reasons Financial Life Advisors, LLC uses personal information, and whether you can limit this use.		
Reasons we can share your personal information		Does Financial Life Advisors, LLC share?	Can you limit this sharing?
For our 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
For our marketing purposes – to offer our products and services to you		Yes	No
For joint marketing with other financial companies		No	Not Applicable
For our affiliates' everyday business purposes – information about your transactions and experiences		No	Not Applicable
For our affiliates' everyday business purposes – information about your creditworthiness		No	Not Applicable
For our affiliates to market to you		No	Not Applicable
For nonaffiliated companies to market to you or for any independent commercial purpose		No. We do not disclose your personal information to nonaffiliated companies for marketing or other commercial use.	Not Applicable
Who we are			
Who is providing this notice?		Financial Life Advisors, LLC	
Questions?	Call (210) 918-8998		

What we do	
How does Financial Life Advisors, LLC 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, secured files, encryption, and restricted access to information.
How does Financial Life Advisors, LLC collect my personal information?	<p>We collect your personal information, for example, when you:</p> <ul style="list-style-type: none"> ▪ Open an account ▪ Deposit money ▪ Seek advice about your investments ▪ Enter into an investment advisory contract ▪ Tell us about your investment or retirement portfolio or earnings <p>We may also collect your personal information from custodians, service providers, and other financial institutions as necessary to service your accounts, meet regulatory obligations, and provide advisory services.</p> <p>Financial Life Advisors, LLC does not sell client personal information.</p> <p>Mobile information will not be shared with third parties or affiliates for marketing or promotional purposes. All mobile opt-in data and SMS consent information will be used solely to communicate with you regarding your relationship with Financial Life Advisors, LLC and will not be transferred, shared, or sold to external organizations.</p>
Definitions	
Affiliates	<p>Companies related by common ownership and control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> ▪ <i>Financial Life Advisors, LLC does not share personal information with affiliates.</i>
Nonaffiliates	<p>Companies not related by common ownership and control. They can be financial or nonfinancial companies.</p> <ul style="list-style-type: none"> ▪ <i>Financial Life Advisors, LLC does not disclose personal information to nonaffiliated companies for their independent marketing or commercial purposes.</i> ▪ <i>We may share information with nonaffiliated service providers only as necessary to service your accounts, support business operations, or comply with legal and regulatory requirements. These service providers are contractually required to maintain the confidentiality and security of your information.</i>
Joint marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or service to you.</p> <ul style="list-style-type: none"> ▪ <i>Financial Life Advisors, LLC does not engage in joint marketing arrangements.</i>