



## PRIVACY POLICY NOTICE

### OUR PROMISE TO YOU

As a client of Accredited Investors Wealth Management, you share both personal and financial information with us. Your privacy is important to us, and we are dedicated to safeguarding your personal and financial information.

### INFORMATION PROVIDED BY YOU

In the normal course of doing business, we typically obtain the following non-public personal information about you:

- Personal information regarding your identity such as name, address, driver's license and Social Security number;
- Information regarding securities transactions effected by us; and
- Financial information such as net-worth, assets, income, account information and account balances.

### HOW WE MANAGE AND PROTECT YOUR PERSONAL INFORMATION

All financial companies need to share clients' personal information to conduct their everyday business activities, such as to process your transactions, maintain your accounts, provide performance reporting or respond to court orders. However, we do not sell your information to third parties. It also is not our practice to disclose your information to third parties unless requested or permitted to do so by you and as permitted by law. While we do share your information with outside companies that perform administrative services for us, our arrangements with these service providers require them to treat your information as confidential.

To protect your personal information from unauthorized use, we maintain physical, electronic and procedural safeguards. Our Privacy Policy requires us to hold your information in strict confidence.





## CLIENT NOTIFICATIONS

We will inform you promptly if there are changes to our policy. Please do not hesitate to contact us with questions about this notice. You may contact us by phone 952-841-2222, mail 5200 West 73<sup>rd</sup> Street, Edina, MN 55439 or email [info@accredited.com](mailto:info@accredited.com).

## OTHER IMPORTANT INFORMATION

State laws and individual companies may give you additional rights to limit sharing. For example, for California, North Dakota, Vermont and Nevada clients, if the mailing address provided for your account is in California, North Dakota, or Vermont, we will automatically treat your account as if you do not want us to disclose your personal information to non-affiliated third parties for purposes of them marketing to you, except as permitted by the applicable state law. Nevada residents may request to be placed on Accredited's "do not call" list at any time by contacting us. Nevada law requires that we provide you with the following contact information for the Bureau of Consumer Protection: Office of the Nevada Attorney General, 555 E. Washington St., Suite 3900, Las Vegas, NV 89101; Telephone: 702-486-3132; Email: [BCPINFO@ag.state.nv.us](mailto:BCPINFO@ag.state.nv.us).



**Accredited Investors**  
WEALTH MANAGEMENT®