Privacy Policy - 2024

C.W. O'Conner Wealth Advisors, Inc.

TO: Advisory Clients of C. W. O'Conner Wealth Advisors, Inc.

FROM: C. W. O'Conner's Compliance Officer

SUBJECT: Privacy of Personal Financial Information

In establishing an advisory account with C.W. O'Conner Wealth Advisors, Inc. you provided certain personal financial information necessary to ensure that your account is managed in a manner consistent with your investment objectives and personal financial goals. This information is generally derived from the following sources:

- Information you provided to us at the time we entered into our initial advisory services agreement.
- Information we obtain from your securities transactions with C.W. O'Conner and from other advisers and broker/dealers who may be providing financial services to you.
- Information you provide to us so we may offer personal financial planning services to you.

It is the policy of C.W. O'Conner Wealth Advisors, Inc. that we do not disclose any non-public personal information about you to anyone, except as is necessary to provide you with investment management and financial planning services.

C.W. O'Conner Wealth Advisors, Inc. restricts access to your personal and account information to those employees and external service providers who need to access such information to provide products or services to you. We maintain physical, electronic, and procedural safeguards to guard your non-public personal information.

We strictly adhere to our privacy policy. Should you ever have any questions or concerns on this important issue do not hesitate to contact us.

Thank you,

Clifford W. O'Conner