PRIVACY POLICY NOTICE

Davis Wealth Advisors LLC
d/b/a: Davis Wealth Advisors
as of
1/22/2026

Davis Wealth Advisors has adopted this privacy policy with recognition that protecting the privacy and security of the personal information we obtain about our customers is an important responsibility. We also know that you expect us to service you in an accurate and efficient manner. To do so, we must collect and maintain certain personal information about you. We want you to know what information we collect and how we use and safeguard that information.

Information We Collect: We collect certain nonpublic information about you ("Customer Information"). The essential purpose for collecting Customer Information is to allow us to provide advisory services to you. Customer Information we collect may include:

- Information that you provide on applications or other forms. This Customer Information may include personal and household information such as income, spending habits, investment objectives, financial goals, statements of account, and other records concerning your financial condition and assets, together with information concerning employee benefits and retirement plan interests, wills, trusts, mortgages and tax returns.
- Identifying information such as your name, age, address, social security number, etc.
- Information about your transactions with us, or others (e.g., broker-dealers, clearing firms, or other chosen investment sponsors).
- Information we receive from consumer reporting agencies (e.g., credit bureaus), as well as other various materials we may use to provide an appropriate recommendation or to fill a service request.

Security of Your Information: We restrict access to your nonpublic personal information to those employees who need to know that information to service your account. We maintain physical, electronic and procedural safeguards that comply with applicable federal or state standards to protect your nonpublic personal information.

Information We Disclose: We do not disclose the nonpublic personal information we collect about our customers to anyone except: (i) in furtherance of our business relationship with them and then only to those persons necessary to effect the transactions and provide the authorized services (such as broker-dealers, custodians, independent managers etc.); (ii) to persons assessing our compliance with industry standards (e.g., professional licensing authorities, consultants, etc.); (iii) our attorneys, accountants, and auditors; or (iv) as otherwise provided by law.

We are permitted by law to disclose the nonpublic personal information about you to governmental agencies and other third parties in certain circumstances (such as third parties that perform administrative or marketing services on our behalf or for joint marketing programs). These third parties are prohibited to use or share the information for any other purpose.

We share information about you, including personal information, with unaffiliated third-party service providers such as: custodians, client relationship management systems, financial planning and portfolio management software and platforms, technology providers, maintenance, backup, storage, virtual infrastructure, and other services provided by vendors which may require them to access or use personal information. If a service provider needs to access information about you to perform services on our behalf, they do so under instruction from us, including instructions that require that they abide

by policies and procedures designed to protect your information. Additionally, we share information about you with trusted contacts, as authorized by you.

Former Clients: If you decide to close your account(s) or become an inactive customer, we will adhere to our privacy policies, which may be amended from time to time.

Changes to Our Privacy Policy: In the event there were to be a material change to our privacy policy regarding how we use your confidential information, we will provide written notice to you. Where applicable, you would be given an opportunity to limit or opt-out of such disclosure arrangements.

Questions: If you have questions about this privacy notice or about the privacy of your customer information call our main number 603-836-3477 and ask to speak to the Chief Compliance Officer.

Massachusetts Residents Opt-In Right: If you are a resident of Massachusetts, we are prohibited from sharing any of your private information (other than disclosures permitted by law) with any third party unless you specifically give us your consent. We are requesting that you opt in to the disclosures to third parties as outlined above. To do so, you may call our main number 603-836-3477 and ask to speak to the Chief Compliance Officer, or return this signed document to your advisor.

_____ I understand and agree to the terms of the Privacy Notice as stated above and authorize Davis Wealth Advisors to disclose my personal financial information to any unaffiliated third-party service provider.

Signed: _____ Date: _____

Print Name: _____