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**301 Forest Avenue, Chattanooga TN, 37405**

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This information is provided to all customers of Campbell Rooks Wealth Management, LLC.

Campbell Rooks Wealth Management, LLC. is committed to safeguarding the confidential information of its clients, former clients, prospective clients, and former prospective clients. We hold all information provided to our firm in the strictest confidence.

We collect and maintain nonpublic personal information about you so we can provide financial services to you. Federal law also requires us to collect and maintain personal information about you to verify your identity, which helps the government fight the funding of terrorism and money laundering activities. The types and categories of information we collect and maintain include:

- Personal and financial information that you provide to us when we open your account, and from time to time in servicing your account, that we may need and may rely on to provide our services to you including, but not limited to, your name, address, date of birth, social security number, driver's license, annual income, net worth and other information that will allow us to identify you.
- Information concerning your investment activity that we may generate, such as your account statements and the performance of your accounts.
- Information that we may collect from insurance companies, clearing firms, custodians or other entities who provide services to you or your investments in connection with the services we may provide to you.

We do not share any non-public personal information about you except as follows:

- With other parties as allowed or required by law, such as state and federal government regulators: SEC, FINRA and the state regulatory bodies.

We do not share any non-public personal information about you with any third-party service providers and joint marketers except as follows:

- With our third-party service providers that may perform services on our behalf, such as accountants and attorneys.
- With third parties when necessary to process a transaction or service your account, such as mutual fund companies, clearing brokers or custodians.

We maintain physical and procedural safeguards designed to guard the privacy of your information. We limit access to your personal information to those employees who need to know in order to conduct our business, service your account and help you accomplish your financial objectives. Our employees are required to maintain and protect the confidentiality of your personal information and must follow procedures to do so. We maintain physical, electronic and procedural safeguards to protect your personal information and respond to changing requirements and advances in technology. We do not rent or sell your name or personal information to anyone.