

# FACTS

## WHAT DOES AMJ FINANCIAL WEALTH MANAGEMENT LLC DO WITH YOUR PERSONAL 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 depend on the product or service you have with us. This information can include:

- Social Security number and income
- assets and transaction history
- investment experience and risk tolerance

When you are *no longer* our customer, we continue to share your information as described in this notice.

### How?

All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons AMJ Financial Wealth Management ("AMJ") chooses to share and whether you can limit this sharing.

Reasons we can share your personal information	Does AMJ share?	Can you limit this sharing?
<b>For our everyday business purposes</b> —such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	YES	NO
<b>For our marketing purposes</b> —to offer our products and services to you	NO	We do not share
<b>For joint marketing with other financial companies</b>	NO	We do not share
<b>For text messaging purposes</b> – To schedule meetings or share general information	YES	YES
<b>For our affiliates' everyday business purposes</b> —information about your transactions and experiences	YES	NO
<b>For our affiliates' everyday business purposes</b> —information about your creditworthiness	YES	NO
<b>For our affiliates to market to you</b>	YES	NO
<b>For nonaffiliates to market to you</b>	NO	We do not share

### To limit our sharing

**Please note:** If you are a new Client, we can begin sharing your information when you enter into an agreement with AMJ. When you are no longer our client, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing. By executing an Investment Advisory Agreement with AMJ, the Client agrees to "opt-in" to this privacy policy.

### Questions?

To opt out please feel free to call us at the office at (703) 466-0477.

**Who we are****Who is providing this notice?**

AMJ Financial Wealth Management (“AMJ”).

**What we do****How does AMJ 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 and secured files and buildings.

We take reasonable steps to ensure the confidentiality of client information shared via text messages. However, clients are reminded to avoid including sensitive personal or financial information, such as account numbers or Social Security numbers, in text messages.

**How does AMJ Financial Wealth Management collect my personal information?**

We collect your personal information, for example, when you

- open an account or give us contact information
- enter into an investment adviser contract or give us your income information
- tell us about your investment or retirement portfolio

We also collect your personal information from other companies.

To ensure compliance and protect client information, all text message communications are conducted using firm-approved, secure communication platforms that are monitored and archived in accordance with regulatory requirements.

**Why can't I limit all sharing?**

Federal law gives you the right to limit only

- sharing for affiliates' everyday business purposes—information about your creditworthiness
- affiliates from using your information to market to you
- sharing for nonaffiliates to market to you

State laws and individual companies may give you additional rights to limit sharing

**Definitions****Affiliates**

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- ***AMJ Financial LLC is an affiliate of AMJ Financial Wealth Management LLC***

**Nonaffiliates**

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- ***We share personal client information with Osaic Wealth, Inc, a nonaffiliated registered Broker Dealer as required by regulatory compliance***

**Joint marketing**

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- ***AMJ Financial Wealth Management doesn't jointly market***

**Other important information**

By signing and executing AMJ's Agreement, I acknowledge that I have fully read and understand this Privacy Policy and opt-in as outlined above. I understand that if I have any questions or concerns about this policy, it is my responsibility to discuss this with my financial professional.