

FACTS

WHAT DOES NW CAPITAL MANAGEMENT LLC AND ITS SUBSIDIARIES (“NWCM”) 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: <ul style="list-style-type: none"> ▪ Social security number ▪ Income ▪ Assets ▪ Account balances ▪ Transaction history ▪ Employment information 	
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 NWCM chooses to share; and whether you can limit this sharing.	
Reasons we can share your personal information	Does NWCM Share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your accounts(s) or respond to court orders and legal investigations.	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	We don’t share
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes – information about your creditworthiness	No	We don’t share
For our affiliates to market to you	Yes	Yes
For non-affiliates to market to you	No	We don’t share
To limit our sharing	<p>Call 703-810-1072 (1-800-269-2156 toll-free)</p> <p>Please note:</p> <p>If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.</p>	
Questions?	Call 703-810-1072 (1-800-269-2156 toll-free)	

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Who we are	
Who is providing this notice?	NW Capital Management LLC and its subsidiaries: <ul style="list-style-type: none"> ▪ NW Insurance Agency LLC ▪ Northwest Tax Group LLC ▪ Northwest Title & Escrow LLC
What we do	
How does NWCM 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.
How does NWCM collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ▪ Open an account ▪ Seek financial or tax advice ▪ Apply for insurance ▪ Give us your contact information ▪ Give us your employment history <p>We also collect your personal information from others, such as credit bureaus, affiliates or other companies.</p>
Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> ▪ sharing for affiliates' everyday business purposes—information about your creditworthiness ▪ affiliates from using your information to market to you ▪ sharing for non-affiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing.</p>
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account - unless you tell us otherwise.
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. Our affiliates include: <ul style="list-style-type: none"> ▪ <i>Northwest Financial Group LLC</i> ▪ <i>Northwest Financial Advisors LLC</i> ▪ <i>Northwest Federal Credit Union</i>
Non-affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ <i>NWCM does not share with non-affiliates so they can market to you.</i>
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ▪ <i>NWCM does not jointly market.</i>