Privacy Policy

Wealth Enhancement Trust Services

At Wealth Enhancement Trust Services, Inc. (WETS), maintaining the trust and confidence of our clients is a high priority. That's why we want you to understand how we protect your privacy as we collect and use your information in order to provide products and services that support your investment needs. We are strongly committed to fulfilling the trust that is the very foundation of your expectations. We have adopted and adhere to the following policy regarding the privacy of our clients' nonpublic personal information.

Information we collect: The types of personal non-public information we may collect directly from you, or with your authorization, include:

- Identification documents or other personal information necessary to service your account in accordance with federal regulations. This information may include your Social Security number, date of birth, address, phone number, email address, and source of wealth, as well as details about your investments, income and expenses, account numbers, and other relevant financial information.
- Information about transactions and account activities.
- Information we receive from third parties involved in servicing your accounts.
- Information received from service bureaus or other third parties.

Information we disclose: As a general rule, we do not disclose personal information about our clients to anyone except under the following circumstances:

- To state, federal, and other regulatory authorities as required by law or regulation.
- To third parties in response to subpoenas or other legal process as required by law.
- At your request, to attorneys, accountants, securities professionals, and others to assist us, or them, in providing services to you.
- To nonaffiliated third parties who perform services or functions for us in conjunction with our services to you. We ensure contractual restrictions on the nonaffiliated third-party use and disclosure of the nonpublic personal information we disclose. Examples include third party custodians, brokers, software providers, third party investment advisory firms, tax providers, banks, auditors, insurers and other service providers with whom we have relationships.
- To affiliates of WETS' parent company, Wealth Enhancement Group, LLC, as needed for enterprise-level risk, compliance, and financial reporting and as otherwise necessary to effectively service your accounts.

How we protect your information: We do not disclose your information to nonaffiliated companies for the purpose of marketing their products to you. WETS maintains physical, electronic, and procedural safeguards that comply with federal and state standards to protect your information. Access is restricted to personnel and providers necessary to perform their duties.

Former clients: We continue to protect the information of former clients in the same manner as current clients except as permitted by law.

Questions?

Thank you for allowing us to serve you. We value your business and are committed to protecting your privacy.
Please contact us if you have any questions about our privacy policy or practices.

Wealth Enhancement Trust Services, Inc.
a South Dakota Chartered Trust Company

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Wealth Enhancement Trust Services™

Trust services offered through Wealth Enhancement Trust Services, Inc.,
a trust company chartered under South Dakota law.

Rev. 11/1/2025

PROD 2025-9877 10/2025