ON TARGET WEALTH PARTNERS, LLC

ANNUAL NOTICE OF PRIVACY PRACTICES

On Target Wealth Partners, LLC, an investment advisory firm, is committed to safeguarding the confidential information of its clients. Protecting your privacy is fundamental to our ongoing business operations. We do collect nonpublic personal information to provide you with accurate and pertinent financial advice. We hold all nonpublic personal information you provide to us in the strictest confidence. If we were to change our firm policy, we would be prohibited under the law from doing so without advising you first.

In performing agreed to services for you, On Target Wealth Partners, LLC collects personal information about you from the following sources:

- Applications or other forms.
- Discussions with nonaffiliated third parties.
- Investment statements and information regarding your transactions with us or others.
- Questionnaires.
- Tax Returns.
- Estate Planning Documents.
- Insurance Policies.

On Target Wealth Partners, LLC uses your personal information in the following manner:

- We do not sell your personal information to anyone.

- We limit employee and agent access to information only to those who have a business or professional reason for knowing, and only to nonaffiliated parties as permitted by law. (For example, federal regulations permit us to share a limited amount of information about you with a custodian in order to execute securities transactions on your behalf, or so that our firm can discuss your financial situation with your accountant or lawyer.)

- We will provide notice of changes in our information sharing practices. If, at any time in the future, it is necessary to disclose any of your personal information in a way that is inconsistent with this policy, we will give you advance notice of the proposed change so you will have the opportunity to opt out of such disclosure.

- We maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk.

- For nonaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors, we also require strict confidentiality in our agreements with them and expect them to keep this information private. Federal and state regulators also may review firm records as permitted under law.

- We do not provide your personally identifiable information to mailing list vendors or solicitors for any purpose.

- Personally identifiable information about you will be maintained during the time you are a client, and for the required time thereafter that such records are required to be maintained by federal and state securities laws. After this required period of record retention, all such information will be destroyed.

On Target Wealth Partners, LLC appreciates your business. If you have any questions or comments about this Privacy Statement, or wish to discuss the possibility of an opt-out of disclosures to nonaffiliated third parties, please call (317) 506-2459.