



Privacy Policy

Shared Prosperity Group, LLC

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What Does Shared Prosperity Group (SPG) 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 and Date of Birth • Financial Account Number(s) and Balances • Sources of Income and Net Worth
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 SPG chooses to share; and whether you can limit this sharing.

Reasons We Can Share Your Personal Information	Does SPG Share?	Can You Limit This Sharing?
For our everyday business purposes such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus.	Yes	No
For our marketing purposes to offer our products and services to you.	Yes	No
For joint marketing with other financial companies.	No	N/A
For our affiliates' everyday business purposes; information about your transactions and experiences.	No	N/A
For our affiliates' everyday business purposes; information about your creditworthiness.	No	N/A
For nonaffiliates to market to you.	No	N/A
Questions? Contact us at (503) 343-9909 or compliance@sharedprosperitygroup.com		



Who We Are

Who is providing this notice?	Shared Prosperity Group, LLC
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What We Do

How does SPG 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 SPG collect my personal information?	We collect your personal information, for example, when you: <ul style="list-style-type: none">• Apply to SPG• Open an Account• Tell Us About Your Investment Goals
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 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.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.



SMS and Text Messaging Privacy

If you opt in to receive SMS or other text messages from us, we collect and use information as described below.

Data Collection and Use	We collect your phone number and your opt-in and consent status so we can send messages related to the specific program or campaign you chose. We use this information only to provide those messaging services.
Data Sharing	We do not share your SMS opt-in with third parties for purposes unrelated to providing the messaging program. We may share personal data, including your SMS opt-in or consent status, with vendors who help deliver messages, such as messaging platform providers, phone carriers, and related service providers.
Data Protection	We use appropriate technical and organizational safeguards to help protect your personal information.
Your Rights	You may request access to, correction of, or deletion of your personal information where applicable. You can opt out of text messages at any time by replying STOP.



Important Disclosures

Registration and Scope: Shared Prosperity Group, LLC (SPG) is a registered investment adviser (RIA) and provides advisory services only where registered, notice-filed, or exempt. Registration does not indicate any specific skill or training.

Giving Program:

- **Purpose and Duration:** SPG's giving program, called "structural generosity," is written directly into its operating agreement as a permanent feature of the business. It's designed to move beyond token, performative philanthropy in finance by making generosity part of the firm's core infrastructure, consistently directing capital to high-impact needs without adding burdens to clients, sparking contentious political fights, or depending on changes to existing tax policy.
- **Commitment:** Every month, SPG contributes at least 10% of its gross revenue (cash basis) to The SPG Structural Generosity Fund (a donor-advised fund) at Charityvest, funded solely by SPG, not client assets.
- **Control:** SPG independently recommends grant amounts, timing, and recipients from the fund. Input from clients or prospects, including surveys, is nonbinding. They have no authority or control over the program and do not select recipients.
- **No Solicitation or Client Impact:** SPG neither requests nor accepts charitable contributions from clients or prospects. Contributions to the fund are funded entirely by SPG revenue. Clients are never asked to donate, and giving does not affect client service, fees, returns, investment recommendations, or portfolio management. Clients do not receive tax deductions.

Informational Only: This content is for informational and educational purposes only. It isn't personalized financial, tax, or legal advice, nor a solicitation to buy or sell any security. Any charts, graphs, and formulas shown are for illustrative purposes only and should not be used out of context. Viewing or using this content doesn't create an advisory relationship with SPG. Always consult a qualified financial professional before making investment decisions.

Performance and Risk: All investing involves risk, including the potential loss of principal. Past performance does not guarantee future results.

For the most current disclosures and information, please visit: sharedprosperitygroup.com.

