

PRIVACY NOTICE

Why?	<p>We take the security of your personal information seriously. Federal law gives you control over how your personal and financial information is shared and requires us to be transparent about our practices.</p> <p>This notice explains the types of information we collect, why we need it, and the measures we take to protect it. Please read this notice carefully so you know how your information is handled.</p>
What?	<p>The specific information we collect and share is aligned with the services we provide. This data can include:</p> <ul style="list-style-type: none"> • Social Security number • Financial account balances, holdings, and transaction history • Investment experience, income, and assets <p>We collect only the information required to execute our services and meet regulatory standards. Note that certain legal obligations may require us to continue sharing some of this information after our professional relationship concludes, particularly for tax reporting and proper account closure.</p>
How?	<p>The table below details the specific reasons financial companies are permitted to share personal information, our firm's policy on sharing, and your ability to limit that sharing. Our approach is to share only what is necessary to best serve you and meet our operational and regulatory obligations.</p>

Reasons we can share your personal information	Do we share?	Can you limit this sharing?
For operational and regulatory purposes —to process your transactions, maintain your accounts, and comply with legal and reporting requirements	Yes	No
For our marketing purposes —to offer our products and services to you Our firm's single, holistic service model means we do not market additional services to you.	No	N/A
For joint marketing with other financial companies We do not sell or share your personal information with third parties for marketing purposes. This includes text message opt-in consent and phone numbers.	No	N/A
For our affiliates' business purposes —information about your transactions and experiences We do not have any affiliates.	No	N/A
For our affiliates' business purposes —information about your creditworthiness We do not have any affiliates.	No	N/A
For nonaffiliates to market to you	No	N/A

Who we are	
Who is providing this notice?	Geometric Wealth Advisors, LLC
What we do	
How does Geometric Wealth Advisors, LLC protect my personal information?	<p>Our firm has a comprehensive security program that includes administrative and technical safeguards designed to protect your information from unauthorized access, use, or disclosure.</p> <p>The security program is supported by a robust cybersecurity infrastructure, internal access controls, and incident detection and response capabilities.</p>
How does Geometric Wealth Advisors, LLC collect my personal information?	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> ■ Sign an investment advisory agreement ■ Open an account ■ Tell us about your investment portfolio or earnings
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only</p> <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 <p>State laws and individual companies may give you additional rights to limit sharing.</p>
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.
Other important information	
<p>Geometric Wealth Advisors, LLC may share your personal information with artificial intelligence (“AI”) services provided by nonaffiliates for our operational and regulatory purposes. Geometric will not provide your personal information to any open-source AI technology tools or allow your data to be used to train third-party AI models, unless such data is fully anonymized and aggregated.</p>	
Questions?	
<p>Contact the Geometric team or visit our website at https://geometricadvisors.com/</p>	