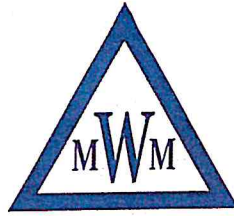


Our Privacy Notice

March 31, 2021



MASSACHUSETTS WEALTH MANAGEMENT, LLC

INVESTMENT COUNSEL

Our Commitment to Your Privacy

Massachusetts Wealth Management (MWM) maintains physical, electronic, and procedural safeguards that comply with federal standards to protect its clients' nonpublic personal information. Through this policy and its underlying procedures, MWM attempts to secure the confidentiality of customer records and information and protect against unanticipated threats or hazards to the security or integrity of customer records and information.

Information We Collect

We collect personal information to provide financial counsel, establish and manage portfolios, and complete transactions on your behalf. The categories of personal information that we collect may include:

- Information required on applications or forms, such as name, address, email address, social security number, birth date, net worth and income for you and your beneficiaries, investment objectives, account numbers.
- Transactional activity in your accounts, such as trading history, balances, and cost basis.

How We Use Your Information

MWM has always considered the protection of sensitive information to be an important and sound business practice and a foundation of client trust. With your permission, we share a limited amount of personal information with your investment custodian to execute transactions on your behalf and maintain accounts. In addition, at your request and only with your authorization, we disclose limited information to attorneys, accountants, and other professionals.

How We Protect Your Information

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards and secured files and buildings. We restrict access to MWM employees who have signed MWM's Code of Ethics and Compliance Manual which includes our Privacy Policy, as well as MWM's Written Information Security Program (WISP) as required by state law.

Record Retention

MWM maintains all documents physically onsite and in a secured storage facility for five years in accordance with State and SEC regulations.

What You Can Do

For your protection, we recommend that you keep your account information and log in credentials confidential. If you become aware of any suspicious activity related to your accounts, please contact us immediately.

As required by federal law, we will notify you of our Privacy Policy annually in writing. If you have any questions, please contact Diana Nickerson at 978-685-1050 or dnickerson@masswealth.com.