



A. Our Promise

You have entrusted Wisdom Index Advisors with very important, nonpublic information. This personal and financial data is yours; therefore, it should remain private. We will not sell or share, for marketing purposes, any client, former client or prospective client information that we collect. We will use your non-public information only to complete transactions or services that you request.

B. Information We Collect

To provide advisory services, we will need information including name and address, social security or tax identification number, date of birth, assets, income, account balances, investment history, account information, important relationships, financial goals and values and risk tolerance information. We may receive information about you that you authorize third parties to provide to us. We also may obtain personal information from third parties to verify your identity, to prevent fraud, or to help us identify products and services that may benefit you. We do not disclose nonpublic personal information about current or former clients to non-affiliated third parties unless required by law or authorized by you. Mobile Opt in, SMS Consent, and phone numbers collected for SMS communication purposes will not be shared with any third party and affiliates for marketing purposes. Further, SMS communications are used by our office for appointment scheduling and appointment reminders as well as for follow-ups if requested by the client. The frequency of SMS communications may vary, and a client may Opt-out at any time by notifying our office. Standard message and data rates may apply. We may utilize artificial intelligence (AI) technologies to support and enhance our business operations, including but not limited to client communication, document analysis, compliance monitoring, and internal process automation. These tools are employed to improve service quality, efficiency, and regulatory compliance. AI systems used by our firm do not replace human oversight and are subject to rigorous confidentiality and security protocols to safeguard client data. We do not use AI to make autonomous investment decisions or to share personal information with third parties without your consent, except as permitted or required by law. We remain committed to transparency, data privacy, and compliance with all applicable laws and regulations governing the advisory industry.

C. Safeguards

To protect your personal information, we maintain physical, electronic, and procedural safeguards keeping with industry standards and practices. We require firms that provide us with services for your account to execute contracts providing confidential treatment of your information. Our Custodian and Client Portal(s) use data encryption technologies including user names and passwords to provide a high-level of security and privacy when accessing your account information on-line.

D. Other Advisors

To benefit from Walking in Wisdom®, our Wealth Management process, Wisdom Index Advisors might need to communicate with your other affiliated advisors, including, but not limited to, your Estate Planning or Tax Attorney, C.P.A, Actuary and Insurance providers for information necessary for wealth planning. We will obtain your authorization to make these communications.

E. Updates

As required by federal law, we will notify you of our privacy policy annually. If our policy is modified at any time, we will notify you immediately. Should you have any concerns, please call us at (972) 931-0063.

F. Disclosures

At least annually, Wisdom Index Advisors updates our Form ADV I, Form ADV Part 2 and Form CRS. These documents describe our service model, business practices, and relationships with others. If you would like a copy of these documents, please call (972) 931-0063. You may also receive the most recent Form ADV Part I on the Internet at www.adviserinfo.sec.gov.