

facts

what does Goodwin Investment Advisory 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: Social Security number and date of birth Phone number(s) and physical and email address Banking and other personal financial information When you are <i>no longer</i> our client, we continue to share your information as described in this notice.
how?	All financial companies must share potential and current clients' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients' personal information: the reasons Goodwin Investment Advisory chooses to share, and whether you can limit this sharing.

reasons we can share your personal information	does Goodwin Investment Advisory share?	can you limit this sharing?
for our everyday business purposes such as processing your transactions, maintaining your account(s), respond to court orders or legal investigations.	yes	no
for our marketing purposes to offer our products and services to you	no	n/a
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?

call (678) 741-2370 or email teamgia@goodwininvestment.com

who we are	
who is providing this notice?	Goodwin Investment Advisory, LLC (“GIA”)
what we do	
how does GIA protect my personal information?	We use security measures that comply with federal law to protect your personal information from unauthorized access and use. These measures include computer safeguards and secured files and buildings.
how does GIA collect my personal information?	We collect your personal information, for example, when you: <ul style="list-style-type: none"> ■ are interested in learning more about our services ■ open an account or give us your contact information ■ seek advice about your investments ■ tell us about your investment or retirement portfolio ■ enter into an investment advisory contract
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 <p>State laws and individual companies may give you additional rights to limit sharing.</p>
what does our website track?	With the use of Google Analytics and Cookies, we track activity on our website. Google may use the collected data to contextualize and personalize the ads of its advertising network. <ul style="list-style-type: none"> ■ You can install the Google Analytics opt-out browser add-on to prevent your activity on the service from being available to Google Analytics. <p>Cookies are issued to track analytics.</p> <ul style="list-style-type: none"> ■ Compile aggregate data about site traffic and interactions to offer better site experiences and tools in the future. ■ We may also use trusted third-party services to track this information on our behalf.
definitions	
affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ■ Timothy Goodwin is the owner of MCSE Stewardship, LLC, and is the majority owner of Goodwin Investment Advisory, LLC. MCSE Stewardship, LLC is the general partner of the private fund Goodwin Real Estate Fund II, LP.
nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ■ GIA does not share with nonaffiliates so that they can market to you.
joint marketing	A formal agreement between nonaffiliated financial companies that market financial products or services to you. <ul style="list-style-type: none"> ■ GIA does not participate in joint marketing.
other important information	
Goodwin Investment Advisory uses multiple third-party vendors for routine business operations, including but not limited to Wealthbox, Google Workspace, Google Drive, Fidelity Investments and their affiliates, eMoney Advisor, and DocuSign. For additional information on GIA’s third-party vendors, please call (678) 741-2370 or email teamgia@goodwininvestment.com .	