

**FACTS** **What Does Cordant, Inc. (dba Cordant Wealth Partners) Do With Your Personal Information?**

<b>Why?</b>	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.
<b>What?</b>	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> <li>■ Social Security number</li> <li>■ Financial account balances, holdings, and transaction history</li> <li>■ Investment experience, income, and assets</li> </ul> <p>When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p>
<b>How?</b>	All financial companies need to share 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 Cordant, Inc. chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Do we share?	Can you limit this sharing?
<b>For our everyday business purposes—</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
<b>For our marketing purposes—</b> to offer our products and services to you	Yes	No
<b>For joint marketing with other financial companies</b>	No	N/A
<b>For our affiliates' everyday business purposes—</b> information about your transactions and experiences	N/A	N/A
<b>For our affiliates' everyday business purposes—</b> information about your creditworthiness	N/A	N/A
<b>For nonaffiliates to market to you</b>	No	N/A

**Questions?** Call (503) 621-9207 or go to <https://www.cordantwealth.com>

## Who we are

**Who is providing this notice?**

**Cordant, Inc.**

## What we do

**How does Cordant, Inc. 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, as well as other physical, electronic, and procedural safeguards.

**How does Cordant, Inc. collect my personal information?**

We collect your personal information, for example, when you

- Sign an investment advisory agreement
- Open an account
- Request investment or financial planning advice
- Tell us about your investment or retirement portfolio

**Why can't I limit all sharing?**

Federal law gives you the right to limit only

- 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.

- Cordant, Inc. currently does not have any affiliates.

**Nonaffiliates**

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- Nonaffiliates can include attorneys, accountants, custodians, etc. We will only share your information with nonaffiliates with your authorization and for the purpose of providing services to you.

**Joint marketing**

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- We do not jointly market to you

## Other important information

Cordant, Inc. may also share your personal information with a successor advisor if necessary in connection with the unexpected death or incapacity of its principal owner(s), as well as in connection with the eventual retirement or other change in control of the firm. We may also utilize artificial intelligence services provided by nonaffiliates to record and transcribe our meetings with your consent and subject to the privacy and use policies of such services.