

Privacy Policy

The Securities and Exchange Commission ("SEC") was required by the Gramm-Leach-Bliley Act to establish standards to safeguard client information and records. As a result, the SEC adopted Regulation S-P, which among other things, requires investment advisors registered with the SEC to adopt appropriate policies and procedures that address safeguards to protect this information and to disclose its privacy policies to clients.

Savant Capital, LLC dba Savant Wealth Management ("Savant") has always taken great measures to protect and safeguard information we gather on our clients. As a financial company, we can choose if or how we 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.

Types of Information Collected

We collect nonpublic personal information about you from the following sources:

- Information we receive from you on applications or other forms, such as your name, address, phone number, Social Security Number, date of birth, account numbers, tax documents, income, employment and residential information, cash balances, security balances, other investments, investment objectives, goals, and risk tolerance, net worth; and
- Information about your transactions with us or with your custodian(s), such as buys, sells, gains, losses, fees, and/ or holdings. Such information may be obtained from paper statements or via electronic download directly from your custodian.

Savant's web servers collect domain names and/ or IP addresses of users to measure what pages and features are accessed by our visitors. This information helps us administer the site, improve content and gather broad demographic information for aggregate use.

Savant may use "cookies" or similar files or scripts throughout its website to enhance your convenience in using our websites, to improve search functionality or to hold information that you would otherwise need to re-key. "Cookies" are text files collected by a user's web browser. If you do not wish to accept "cookies" from our website, you may configure your web browser so that it does not accept "cookies"; however, you may lose certain functions available on our website.

Affiliations

Savant Capital, LLC dba Savant Wealth Management, is owned by SCMI, Inc., Aviation Transport Sales and Training LLC and Cynosure Savant Holdings, LLC. Savant Capital, LLC is the sole member of Savant GPS, LLC dba Savant Tax & Consulting. Savant is affiliated with Savant Legal LP, a law firm that provides estate planning document preparation and other legal services.

Use of Personal Information

We do not sell your personal information to anyone. We do not share your information for joint marketing with other financial companies or information about your creditworthiness for our affiliates' everyday business purposes. We do not share your information so non-affiliates can market to you.

We do not disclose or share nonpublic personal information about you to third parties, unless one of the following limited exceptions applies or you have specifically asked us to do so:

- We disclose personal information to companies that help us process or service your transactions or account(s) (such as Fidelity, TD Ameritrade, Schwab Institutional, The Vanguard Group, ASPIre Financial Services, LLC, or others, as applicable).
- We may disclose or report personal information in limited circumstances where we believe in good faith that disclosure is required or permitted under law, for example, to cooperate with regulators or law enforcement authorities.

Savant restricts access to your personal and account information to those employees who need to know that information in order to provide services to you. We maintain physical, electronic, and procedural safeguards to guard your nonpublic personal information.

Savant uses services from Google and other third-parties for advertising purposes. Information about how Google protects data may be found at www.google.com/policies/privacy/.

Emergency Contact

From time to time due to unforeseen circumstances relating to the physical or mental health of a client, the best financial interests of the client may be served if Savant is able to communicate regarding the client with another individual. If the client has provided Savant with a properly executed copy of the client's power of attorney, Savant may contact the client's attorney-in-fact, if Savant reasonably believes doing so is in the best interest of the client. If the client has provided Savant with a properly executed copy of a Client Advocate Designation, Savant may communicate with the Client Advocate. If the client's attorney-in-fact or Client Advocate is unavailable, Savant may communicate with a responsible family member Savant reasonably believes is an appropriate person with whom to communicate under the circumstances.

Sharing Practices Notification

We must provide you with a copy of this statement, which details our sharing practices, when you initially open an account and each year while you are a customer, IF a change has been made to our privacy policies and practices. A copy of our Privacy Policy is available at www.savantwealth.com.

Changes to Privacy Policy

In the future, Savant may offer new and different programs that necessitate a change in this Policy. Savant reserves the right to change its privacy policy at any time without prior notice. Any changes to the privacy policy will be posted on our website at www.savantwealth.com under the Privacy section and will be effective immediately upon posting.

Governing Law and Jurisdiction

This Policy, and Savant's collection and use of customer information, shall be governed and interpreted in accordance with the laws of the United States and the State of Illinois. Any disputes arising out of this Policy shall be adjudicated in a court of competent jurisdiction in the Eastern District of the State of Illinois.

Phishing Scams

Savant does not send emails to customers requesting billing, login or password information. If you receive an email purporting to be from Savant that asks you to provide personal or account information, or login and passwords, do not provide such information unless you have first verified that the website or email is from Savant. Such emails may be fraudulent and used in connection with scams known as phishing. Savant asks that you report any suspicious emails or websites to Savant.

Disposal of Information

Savant has taken steps to reasonably ensure that the privacy of your nonpublic personal information is maintained at all times, including in connection with the disposal of information that is no longer required to be maintained. Such steps shall include whenever possible, shredding paper documents and records prior to disposal, requiring off-site storage vendors to shred documents maintained in such locations prior to disposal, and erasing and/or obliterating any data contained on electronic media in such a manner that the information can no longer be read or reconstructed.

Right to Limit Sharing

Federal law gives you the right to limit sharing only for:

- affiliates' everyday business purposes—information about your creditworthiness (we do not share)
- affiliates to market to you (we do not share)
- non-affiliates to market to you (we do not share)

State laws and individual companies may give you additional rights to limit sharing.

Contact and Modifying Personal Information

If you should ever decide to close your account(s) or become an inactive client, we will continue to adhere to the privacy policies and practices as described in this notice. Should you have any questions about the privacy and protection of your records, please contact us and we will be happy to discuss this matter with you.

You may request copies of or have Savant make changes or corrections to personal information in Savant's possession by contacting Savant at privacy@savantwealth.com. You may opt out of receiving further communications from us or others through any of the following methods:

- Send an email to: privacy@savantwealth.com
- Send a request by mail to: Concierge Team, Savant Wealth Management, 190 Buckley Drive, Rockford, IL 61107.

- Call: (815) 227-0300

Please note that you cannot opt out of receiving any notifications or disclosures that we are required by Federal or State law to provide to you.

Definitions	
Everyday Business Purposes	The actions necessary by financial companies to run their business and manage customer accounts, such as providing investment advisory and financial planning advice, processing securities transactions, and otherwise providing financial services to you.
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.
Non-Affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

ANY QUESTIONS: Savant’s Chief Compliance Officer, Margaret Baer, remains available to address questions pertaining to any issue referenced in this Brochure.