# Privacy Policy for Lloyds Intrepid LLC
# As of September 23, 2026

Lloyds Intrepid LLC, doing business as Lloyds Intrepid Wealth Management, recognizes that our relationships with current, former and prospective clients are based on integrity and trust. We work hard to maintain your privacy and to preserve the private nature of our relationship with you. We place the highest value on the information you share with us. Lloyds Intrepid LLC will not disclose your personal information to anyone unless it is required by law or at your direction. We will not sell your personal information. Lloyds Intrepid LLC will provide this privacy statement to all clients annually. Former clients and prospects will remain covered under this policy for the duration of time records are maintained by this firm.

We want our clients to understand what information we collect, how we use it, and how we protect your personal information.

Why We Collect Your Information

We gather information about you so that we can:

- Help design and implement the investment and planning related services we provide you; and
- Comply with the Federal and State laws and regulations that govern us.

What Information We Collect and Maintain

We may collect the following types of "nonpublic personal information" about you:

- Information from our initial meeting or subsequent consultations about your identity, such as your name, address, social security number, date of birth, and financial information.
- Information that we generate to service your financial needs.
- Information that we may receive from third parties with respect to your financial profile.

What Information We Disclose

We are permitted by law to disclose nonpublic information about you to unaffiliated third parties in certain circumstances. For example, in order for us to provide planning or investment management services to you, we may disclose your personal information in limited circumstances to various service providers, such as our clearing firm, financial planning software providers, electronic storage providers or independent contractors hired by Lloyds Intrepid LLC. Arrangements with companies or independent contractors not affiliated with Lloyds Intrepid LLC will be subject to confidentiality agreements. If a Financial Planner/Financial Adviser leaves Lloyds Intrepid LLC to join another firm, he or she will not be permitted to retain copies of client information.

"Opting-Out" of Third Party Disclosures: If you do not want your sensitive information shared with unaffiliated third parties, you may contact us by calling 281-886-3039. Opting-Out may prevent us from servicing your portfolios.

Otherwise, Lloyds Intrepid LLC will not disclose any personal information about you or your account(s) unless one of the following conditions is met:

- We receive your prior written consent; or
- We have documentation that the recipient is your authorized representative; or
- We are required by law to disclose information to the recipient.

How We Protect Your Personal Information

Privacy has always been important to Lloyds Intrepid LLC. We restrict and limit access to client information only to those who need to carry out their business functions. We educate employees about safeguarding client information and preventing its unauthorized access, disclosure, or use. Employees will be required to acknowledge their acceptance and understanding of the privacy policy in writing. We maintain physical, electronic, and procedural safeguards to protect your confidential personal information.