

FACTS**What does Sondo Fi, Inc. 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:

- Personally-identifiable information, such as full legal name, contact information, and birth date
- Financial account balances, holdings, and transaction history
- Investment experience, household income, and approximate net worth (assets and liabilities)

When you are *no longer* our customer, we continue to share your information as described in this notice.

How?

All financial companies are required 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 Sondo Fi, Inc. shares; and whether you can limit this sharing.

Reasons we can share your personal information	Do we share?	Can you limit this sharing?
For our everyday business purposes— such as to establish access to our website for you, refer you to other investment advisers, or respond to court orders and legal investigations	Yes	No
For our marketing purposes— to offer our products and services to you	Yes	No
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?

Email concierge@sondofi.com or go to <https://www.sondofi.com/>

Who we are

Who is providing this notice?

Sondo Fi, Inc.

What we do

How does Sondo Fi, 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 Sondo Fi, Inc. collect my personal information?

We collect your personal information, for example, when you:

- Request to be referred to another investment adviser
- 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.

- n/a

Nonaffiliates

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

- We share your information with one or more third-party registered investment adviser(s) ("Third-Party Adviser(s)") in order to match or refer you to the Third-Party Adviser(s) we believe to be the right fit for your needs.

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

Sondo Fi, 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.