FACTS	What does SFMG Wealth Advisors do with your personal information?
Why?	This Privacy Policy describes how "we", an SEC Registered Investment Advisor, collects, uses, and discloses personal information about our clients. We are committed to protecting your privacy and maintaining the confidentiality and security of your personal information in accordance with applicable laws and regulations. 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.
What?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: • Personal identifiers (Social Security Number and driver's license number) • Financial details (Account information, income, credit history) • Employment Information • Other Personal Information (Address, phone number and email address) When you are no longer our client, we continue to share your information described in this notice.
How?	All financial companies need to share client's personal information to run their everyday business. In the section below, we list the reasons financial companies can share their client's personal information; the reasons SFMG Wealth Advisors chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does SFMG Wealth Advisors share?	Can you limit this sharing?
For our everyday business purposes – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or to report to credit bureaus.	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 to market to you	No	N/A
For non-affiliates to market to you	No	N/A

Questions? Please call us at (972) 960-6460

Who we are...	
Who is providing this notice?	SFMG Wealth Advisors

What we do...	
How does SFMG Wealth Advisors protect my personal information?	We maintain physical, electronic, and procedural safeguards designed to protect your personal information. These include: • Encryption of sensitive information • Secure facilities and systems • Access controls and authentication procedures • Regular security assessments and employee training • Vetting of AI and technology vendors for security compliance • SMS consent and phone numbers provided for SMS purposes will not be shared with any third parties or affiliates for marketing purposes. However, no data transmission or storage system is completely secure. If you have reason to believe that your interaction with us is no longer secure, please notify us immediately.
How does SFMG Wealth Advisors collect my personal information?	Your information may be collected from multiple sources. These sources include, but are not limited to: • Opening of accounts and your transactions thereafter • During electronic, telephone, written, and verbal communications and/or communications with you and with your authorized representatives (such as your attorney, accountant or any other third party representative you have authorized) • From other personal information that you provide when you have a financial plan prepared We may also collect your personal information from other companies.
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 non-affiliates to market to you State laws and individual companies may give you additional rights to limit sharing.
How does SFMG use Artificial Intelligence (AI) and how am I protected when you are using AI?	We utilize AI notetaking tools to assist with documentation during client interactions. When using AI tools: • You are given the opportunity to opt out of the use of our AI note taking tools • Notes recorded by AI are securely stored and accessible only by authorized personnel • Data processed by AI is not shared with third parties for marketing or any purpose outside of SFMG Wealth Advisors' business operations • All third-party AI providers we engage with are bound by confidentiality agreements and must comply with our data security standards • We select AI service providers who implement appropriate technical and organizational measures to protect your data • Personal information processed by AI tools is subject to the same retention and deletion policies as other personal information we maintain

Definitions

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. ***SFMG Wealth Advisors has no affiliates.***
Non-affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. ***These include broker/dealers, mutual fund companies, insurance companies and other financial institutions.***
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. ***SFMG Wealth Advisors does not do joint marketing.***
AI notetaking tool	Software applications that utilize artificial intelligence and machine learning technologies to perform one or more of the following functions during or after client meetings: • **Transcription**: Converting spoken conversations into written text • **Summarization**: Creating concise summaries of lengthy discussions • **Key Point Extraction**: Identifying and organizing important topics, action items, or decisions from meeting content • **Content Organization**: Structuring meeting information into categories, topics, or themes • **Follow-up Generation**: Creating draft follow-up materials based on meeting content These tools may process audio recordings, real-time speech, or text inputs to generate notes, summaries, action items, or other documentation related to client meetings. These tools do not analyze or make decisions based on the data.