

## Privacy Opt-Out Form

If you would like to limit the personal information that your financial advisor could disclose or take if he or she moved to another investment advisory firm and terminated their relationship with CWM, LLC, please complete and mail the following form to:

Carson Partners Operations  
14600 Branch Street  
Omaha, NE 68154

OR email a scanned copy of your form to [privacy@carsongroup.com](mailto:privacy@carsongroup.com)

You can withdraw your opt-out choice at any time by contacting us in writing at the address or email address provided above.

If your primary address is in a state that requires your affirmative consent to share your personal information with a new firm, then you must give your written consent before we will allow your financial advisor to take any of your personal information to that new firm.

By completing and returning this form as described, I am instructing CWM, LLC to limit the personal information about me that my financial advisor could disclose or take if he or she moves to another investment advisory firm and terminates their relationship with CWM, LLC.

Please note that for accounts held jointly by two or more persons, the privacy choices made by any account holder apply to all joint holders with respect to the account. In order for your opt-out election to be effective, you must complete ALL of the following information:

Name (please print clearly): \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Zip: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Name of CWM, LLC Financial Advisor: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_