

## Privacy Opt-Out Form

If you would like to limit the personal information shared in accordance with our privacy policy, please check the categories of information you are opting-out of sharing and mail the following form to:

CWM, LLC  
Attention: Privacy Opt Out  
14600 Branch Street  
Omaha, NE 68154

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

I am opting out of personal information sharing for the following categories:

- For affiliates to market to me
- For non-affiliates to market to me
- For my advisor representative, who is not under a restrictive covenant and leaves CWM, LLC, to disclose my personal information to the new firm to facilitate the transition.

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 advisor representative to take any of your personal information to that new firm.

By completing and returning this form, I am instructing CWM, LLC to limit the personal information about me as selected above.

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:

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

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

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

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

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

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