



MAGNOLIA WEALTH

FACTS		WHAT DOES MAGNOLIA WEALTH DO WITH YOUR PERSONAL INFORMATION?	
Why? What? How?	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.		
	The types of personal information we collect and share depend on the product or service you have with us. This information can include: • Social Security number, tax identification number, and employee identification number • Account balances, income, and total net worth		
	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons we choose to share; 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 process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus		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		Yes	Yes
For our affiliates' everyday business purposes – information about your creditworthiness		No	N/A
For our affiliates to market to you		No	N/A
For non-affiliates to market to you		No	N/A
To Limit Our Sharing Questions?	Complete the Form Below		
	<i>Please note: If you are a new customer, we can begin sharing your information from the date you receive this notice. When you are no longer our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.</i> Call (713) 299-5418		

Who We Are	
Who is providing this notice?	Huber Wealth Management, LLC dba Magnolia Wealth
What We Do	
How do we protect your 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.
How do we collect your personal information?	We collect your personal information, for example, when you • Open an account or deposit money • Enter into an advisory contract • Tell us about your investment or retirement portfolio
Why can't you 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.
What happens when you limit sharing for a jointly owned account?	Your choices will apply to everyone on your account – unless you tell us otherwise.
SMS – Mobile Information	SMS Consent Communication: The information (phone numbers) obtained as part of the SMS consent process will not be shared with third parties/affiliates for marketing/promotional purposes. All other categories exclude text messaging originator opt-in data and consent; this information will not be shared with any third parties. Types of SMS Communication: If you have consented to receive text messages from Magnolia Wealth, you may receive messages related to the following: scheduling information and meeting confirmation.



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Definitions

Affiliates	Companies related by common ownership or control. They can be financial and non-financial companies.
Non-affiliates	Companies not related by common ownership or control. They can be financial and non-financial companies.
Joint marketing	A formal agreement between non-affiliated financial companies that together market financial products or services to you.

Form to Limit Sharing

Name & Address		Send to:
Additional Notes	☐ Do not share information about my creditworthiness with your affiliates for their everyday business purposes. ☐ I do not allow you or your affiliates to use my personal information to market to me. ☐ Do not share my personal information with nonaffiliates to market their products and services to me. ☐ I do not consent to SMS communications.	andrew.huber@ magnolia- wealth.com

Dated 07/2026