



PRIVACY NOTICE

March 20, 2025

Whitener Capital Management is committed to safeguarding the privacy and security of the personal information that you provide to us. We recognize and respect the value of your privacy and want you to have a clear understanding of our policies with regard to the handling of personal and confidential information. We collect personal information about you for business purposes, such as evaluating your financial needs and goals, processing your requests and transactions, informing you about products and services that might be of benefit to you, and providing additional services as you may request.

We collect the following categories of information about you:

- Information received from you on applications
- Personal financial statements
- Other written, oral or electronic communications such as:
 - Your name
 - Address
 - Social security number
 - Assets
 - Income
 - Other financial data
- Information with regard to your account(s) with us, the assets held and the changes made thereto
- Information from third parties including those providing brokerage or other services for your account(s) & transactions therein.

Whitener Capital Management acknowledges its obligation to keep information about you and your account(s) secure and confidential. We do not share any information about our customers, former customers, or prospective customers with anyone. We consider the sharing of any such information to be a violation of our company and personal ethics, and we do not provide customer information to any person, agency or company for any purpose either internal or external, except as outlined below, unless required by state or federal law.

- We will share with brokers information that may be necessary to establish, maintain or service your account, affect approved transactions or provide ancillary services you may request.
- We will, at your request, provide information to your accountant, attorney or other advisors and individuals as you may direct.

Files containing customer and account information are maintained in restricted areas and may be accessed for legitimate business purposes only. Our employees are subject to a Code of Ethics and our Company Policy on Confidentiality that, if breached, may result in dismissal from the firm.

We are committed to protecting your privacy. We believe that it is absolutely necessary that we do so in order to build the trust and confidence necessary for long-lasting relationships with the customers we serve. Should you have questions about this notice or our policies please call us between 8:30am and 5:00pm at (252) 972-8909.