2022 Privacy Policy

FACTS:	WHAT DOES TPB WEALTH ADVISORS DO WITH YOUR PERSONAL INFORMATION?
Why?	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.
What?	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 and income • Assets, account balances and transaction history • Investment experience and risk tolerance When you are no longer our customer, we continue to share your information as described in this notice.
How?	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 Aspireon Wealth Advisors chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	**Does Aspireon 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 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	WE DON'T SHARE
For our affiliates' everyday business purposes— information about your transactions and experiences	NO	WE DON'T SHARE
For our affiliates' everyday business purposes— information about your creditworthiness	NO	WE DON'T SHARE

For non-affiliates to market to you	NO	WE DON'T SHARE
Questions?	Call 210-424-8710	

Who we are	
Who is providing this notice?	TPB WEALTH ADVISORS, LLC

What we do	
How does TPB Wealth Advisors protect my 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 does TPB Wealth Advisors collect my personal information?	We collect your personal information, for example, when you: • Open an account and enter into an investment advisory contract; • Give us your income, employment and contact information; • Tell us about your investment or retirement portfolio; or • Seek advice about your investments.
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.

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. • Texas Partners Bank • The Bank of San Antonio Insurance Group
Non-affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. • TPB Wealth Advisors does not share with non-affiliates so they can market to you.
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. • TPB Wealth Advisors doesn't jointly market.
Other important information	

TPB Wealth Advisors is a registered investment adviser with the United States Securities Exchange Commission. Additional information is available on the SEC's website at www.adviserinfo.sec.gov. Anyone wishing to file a complaint against Aspireon Wealth Advisors should contact one of the following:

FINRA Investor Complaint Center
9509 Key West Avenue
Rockville, MD 20850-3329
Phone: (240) 386-HELP (4357)
Fax: (866) 397-3290

Securities and Exchange Commission
Compliant Center
100 F Street, NE
Washington, DC 20549-5990

ASPIREON WEALTH ADVISORS PRODUCTS AND SERVICES ARE NOT INSURED BY THE FEDERAL DEPOSIT INSURANCE CORPORATION, ARE NOT A DEPOSIT OF THE BANK, ARE NOT GUARANTEED BY THE BANK, AND MAY LOSE VALUE.