

MAGNUS FINANCIAL GROUP LLC

PRIVACY NOTICE

March 2026

Magnus Financial Group LLC (“Magnus”) is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to them. Magnus and its personnel are committed to protecting your privacy and to safeguarding that information.

All financial companies choose how they share client 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 non-public personal information. Even when you are no longer our client, we will only share your personal information as described in this notice. Thus, please read this notice carefully to understand what we do.

We collect non-public personal data in forms, in written notations and in documentation provided to us by our clients for use in providing investment and wealth management services. The types of personal information we collect and share depend on the scope of your engagement with us. This information may include items such as your Social Security number and income, your account balances and transaction history, and your investment experience.

We collect your personal information in a variety of ways. For example, we obtain your personal information when you open an account or give us your income information, tell us about your portfolio or transfer money, or enter into an investment advisory contract. We also collect your personal information from other companies, such as the custodian(s) who holds your account assets.

We are committed to the protection and privacy of our clients’ personal information. We will not share such information with any affiliate (a company related to Magnus by common ownership or control) except for our everyday business purposes, such as to process your transactions (for example, with custodians, data processing firms or clearing firms), maintain your account(s), respond to court orders and legal and regulatory examinations, report to credit bureaus, protect the confidentiality or security of your records (for example, to protect against, or prevent actual or potential fraud, identify theft, or unauthorized transactions), or as permitted or required by law. We may also share your personal information consistent with your instruction or consent or in connection with a written agreement to provide investment or advisory or management services when the information is released for the sole purpose of providing the products or services covered by the agreement.

We do not share personal or financial information with affiliated or non-affiliated third parties except under the circumstances noted above. Since sharing under the circumstances noted above is necessary to service client accounts or is mandated or permitted by law, there are no allowances for clients to opt out of such sharing. Individual state laws may give you additional rights to limit sharing.

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 building environment.

Our policy about obtaining and disclosing personal information may change from time to time. We will provide you notice of any material change to this policy before we implement the change.

If you have questions, please call us at 1-800-339-1367 and ask for the Chief Compliance Officer or go to our website at www.magnusfinancial.com.