

Rev. May 6, 2026	PRIVACY POLICY – LONESTAR REGISTERED INVESTMENT ADVISORS, LLC																						
Facts	WHAT DOES LONESTAR REGISTERED INVESTMENT ADVISORS, LLC DO WITH CUSTOMER INFORMATION?																						
Why?	Financial companies choose how they share your Customer 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 Customer Information. Please read this notice carefully to understand what we do																						
What?	The types of Customer Information we collect and share depend on the product or service you have with us. This information can include: • Social Security number and financial information • Account balances and transaction history • Any data or analysis derived from this information When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.																						
How?	All financial companies need to share Customer Information to run their everyday business. In the section below, we list the reasons financial companies can share their Customer Information; the reasons Lonestar Registered Investment Advisors, LLC chooses to share; and whether you can limit this sharing.																						
<table><tr><th>Reasons we can share your Customer Information.</th><th>Do we share?</th><th>Can you limit this sharing?</th></tr><tr><td>For our everyday business purposes (Regulation S-P §248.14-248.15) -Such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus</td><td>Yes</td><td>No</td></tr><tr><td>For our marketing purposes- To offer our products and services to you</td><td>Yes</td><td>No</td></tr><tr><td>For joint marketing with other financial companies – third party must be bound by confidentiality restrictions per Regulations S-P §248.13.</td><td>Yes</td><td>Yes</td></tr><tr><td>For our affiliates’ everyday business purposes- Information about your transactions and experiences, credit worthiness and to market to you</td><td>Yes</td><td>No</td></tr><tr><td>For our non-affiliates to market to you</td><td>No</td><td>N/A</td></tr><tr><td>For buying, selling, or sharing of client data gathered for text messaging</td><td>No</td><td>N/A</td></tr></table>			Reasons we can share your Customer Information.	Do we share?	Can you limit this sharing?	For our everyday business purposes (Regulation S-P §248.14-248.15) -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 – third party must be bound by confidentiality restrictions per Regulations S-P §248.13.	Yes	Yes	For our affiliates’ everyday business purposes- Information about your transactions and experiences, credit worthiness and to market to you	Yes	No	For our non-affiliates to market to you	No	N/A	For buying, selling, or sharing of client data gathered for text messaging	No	N/A
Reasons we can share your Customer Information.	Do we share?	Can you limit this sharing?																					
For our everyday business purposes (Regulation S-P §248.14-248.15) -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 – third party must be bound by confidentiality restrictions per Regulations S-P §248.13.	Yes	Yes																					
For our affiliates’ everyday business purposes- Information about your transactions and experiences, credit worthiness and to market to you	Yes	No																					
For our non-affiliates to market to you	No	N/A																					
For buying, selling, or sharing of client data gathered for text messaging	No	N/A																					

To limit our sharing	Call: 866-785-5350 Please note: If you are a <i>new</i> client, we can begin sharing your information from the date we sent this notice. When you are <i>no longer</i> our client, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.
Who is providing this notice?	Lonestar Registered Investment Advisors, LLC
WHAT WE DO	
How do we protect your Customer Information?	We maintain policies and procedures reasonably designed to safeguard customer information, including: • Administrative, technical, and physical safeguards to protect against unauthorized access or use; • Proper disposal of customer information when no longer required; • Oversight of service providers who may access or maintain customer information
How do we collect your Customer Information?	We collect your Customer Information when you engage our services and we gather information to provide your services. We may also collect your Customer Information from others, such as affiliates or other companies.
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.
DEFINITIONS	
Affiliates	Companies related by common ownership or control. They can be financial and non-financial companies. • Texas Alliance Financial Services, LLC • Alliance Financial Services • M & M Wealth Management LLC dba Lonestar Wealth Management
Non-Affiliates	Companies not related by common ownership or control. They can be financial and non-financial companies. • Gradient Investments, LLC
Joint Marketing	A formal agreement between non-affiliated financial companies that together market financial products or services to you. • Gradient Investments, LLC

Other important information	
Questions?	Call: 866-785-5350