

## SOCIAL MEDIA DISCLOSURE

Last updated: January 2026

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The content provided on PWF social media sites is for **informational and educational purposes only**. It should not be considered a solicitation, offer, or recommendation to buy or sell any security, nor should it be construed as investment advice. Investment advice is only provided to individuals who have entered into a written investment advisory agreement with PWF.

### Content, Accuracy, and Third-Party Material

Communications posted by unaffiliated third parties or shared by PWF on social media are **not intended to be testimonials or endorsements** of PWF. PWF may monitor, but does not pre-review, third-party content posted on or linked through PWF social media sites. Such content represents the views and responsibility of the third party, not PWF. PWF expressly disclaims responsibility for the accuracy, appropriateness, or usefulness of any third-party content, product, service, or hyperlink.

Any performance information displayed represents **past performance**, which does not guarantee future results. Investment returns and principal values will fluctuate. PWF does not guarantee the accuracy or completeness of any performance-related information derived from third-party sources. All opinions and estimates are subject to change without notice.

### Employee Social Media Requirements

PWF maintains internal policies governing the conduct of its supervised persons on social media. Under these requirements, supervised persons:

- **Must not reference PWF’s services or investment management performance** on any personal social media site where they maintain a presence.
- **Receive annual training** in social media compliance to ensure adherence to firm policies and regulatory expectations.

PWF employees are also prohibited from engaging with social media content—such as “likes,” comments, shares, or responses—that could be interpreted as testimonials, endorsements, personalized investment advice, or confirmation of a client relationship. (Derived from the requirements in the Social Media Attestation.)

## **Restrictions to Prevent Testimonials and Endorsements**

In accordance with PWF policy and regulatory requirements:

- PWF does not publish, solicit, or endorse client testimonials or endorsements on social media.
- PWF may remove or restrict third-party commentary that could be construed as a testimonial, endorsement, investment recommendation, or advertising. (Based on the express testimonial and endorsement prohibitions in your current Social Media Disclosures.)

## **No Personalized Advice Through Social Media**

PWF does not provide personalized investment, tax, or legal advice through social media platforms. Content should not be used as a substitute for individualized investment advice. Investment advice is only provided to PWF clients with an executed advisory agreement.

## **For Additional Information**

For information about PWF's investment advisory services, fees, or the risks associated with investing, please contact us for our written disclosure brochure. For information on becoming a PWF client, please contact us at **(248) 946-4515**.