

Wela Strategies - Social Media Rules of Engagement

Welcome! Wela Strategies (“Wela”) and its affiliates are delighted to connect with you through various social media websites including YouTube, Twitter, LinkedIn, Instagram, and Facebook. We look forward to sharing news, career, and company information with you. We also look forward to hearing what you have to say as it relates to news and information regarding the financial services industry. In addition to Wela’s company website, www.welastrategies.com, our organization is also affiliated with the Money Matters radio show, hosted by Wes Moss, on WSB Radio. All social media websites affiliated with Money Matters are subject to the same rules of engagement outlined below. At Wela, our number one priority is to help you Sleep Well at Night (SWAN). We do that by striving to earn your confidence and trust every day, and by helping you work toward your long-term financial goals and objectives. We look forward to connecting with you.

Rules of Engagement

- Because the financial services industry is highly regulated, there are certain rules we need to follow on social media websites where we have a presence. We welcome you to post images, video, and content that are related to the purpose of the topic at hand. Please do not post comments that are unlawful, abusive, defamatory, offensive, or that contain profanities. We ask that you respect these rules. Posts and comments that do not comply will be removed at our discretion. This includes positive comments or messages of support for our services. Under the Children’s Online Privacy Protection Act of 1998, persons under the age of 13 years old are not allowed to submit questions or comments.
- We may not be able to respond to all posts. This is not because we aren’t interested, but because we must adhere to strict communications guidelines. We’ll do our best to create a valuable and useful space for you on our social media properties.
- Do not post specific financial questions about your personal situation or your account information on social media websites (even if it is through direct message). If you are a client, please contact your advisor on our team. You can also submit a general inquiry

through the home page of our website, where your request will be fulfilled in a timely manner. If you are not a client, then you can find an advisor who is right for you at: <https://www.welastrategies.com/our-team/> or call (678) 608-0420.

- We want to help you protect your privacy. While we maintain a presence on social media websites, we are not affiliated with them, and we cannot control how those websites or other parties will use the information you share on it. In other words, it's up to you to review and understand the privacy policies and terms of service for each social media website you choose to participate in, and to be knowledgeable about how account settings work and aware of how user information can be displayed and used throughout the site. For your own security, you should never communicate any personal or account information using these channels. Posts on all of our social media websites (including YouTube, Twitter, LinkedIn, Instagram, and Facebook) will be reviewed by Wela and treated according to terms of our privacy notice at <https://www.welastrategies.com/wp-content/uploads/2022/09/Wela-Privacy-Notice-September-2022-1.pdf>. The privacy policy is intended for US residents only.
- Whenever a third-party posts content to our social media websites, this information remains the responsibility of the party submitting the content and does not represent our or our affiliates viewpoints or serve as an indication or guarantee of future results. Content posted on our social media channels should not be considered a recommendation or personalized advice. Where specific advice is necessary or appropriate, individuals should consult with a qualified tax advisor, legal advisor, CPA, financial planner, or investment advisor pertaining to their individual situations. Posts by others that describe opinions, views, or experiences may not be representative or indicative of another's personal experience. Individuals or firms that have a business relationship with CIA or its affiliates have a beneficial interest in commenting should be aware that they may have an obligation to disclose that relationship or interest in their posts. As always, we reserve the right to remove comments received from third parties based on our established criteria.

- Our social media programs may follow another user, share or provide hyperlinks to third-party content, and/or "like/favorite" third-party content. Doing so is intended to provide additional perspective and should not be construed as an endorsement of any services, products, guidance, individuals, or points of view outside of Wela or its affiliates. All content distributed through Wela's social media channels is intended for U.S. residents only.
- If you are a client of Wela, our social media platforms are not a substitute or conduit for communicating your financial objectives or changes in your financial situation. Please contact us and your advisor directly should you want to discuss your financial status, trades, accounts, etc. Your relationship is very personal and should be discussed confidentially and not on our websites, public or private.
- If you're a Wela client and have questions about your account or need assistance with an account transaction, please call us directly at (678) 608-0420, or visit www.welastrategies.com.

Social media content includes books, articles, news, commentary, opinions, viewpoints, analyses and other information developed by Wela Strategies, its affiliates and unaffiliated third parties, which is subject to change at any time without notice. This information is provided for illustrative and informational purposes only. Nothing posted herein should be construed as investment advice or a recommendation of any specific course of action and is being presented without consideration of the investment objectives, risk tolerance, or financial circumstances of any specific investor and might not be suitable for all investors. The mention of any company is provided for informational purposes and as an example only and is not to be considered investment advice or recommendation or an endorsement of any particular company. Always consult your own legal, tax, or investment advisor before making any investment/tax/estate/financial planning considerations or decisions. Investment decisions should not be made solely based on information posted on social media websites.

All investments involve risks, including possible loss of principal. An Advisor's judgment about markets, interest rates or the attractiveness, relative values, liquidity, or potential appreciation of particular investments is important to the portfolio accomplishing its goals. The portfolio could experience losses if these judgments prove to be incorrect. Stock prices fluctuate, sometimes rapidly and dramatically, due to factors affecting individual companies, particular industries or sectors, or general market conditions. For stocks paying dividends, dividends are not guaranteed, and can increase, decrease or be totally eliminated without notice. Fixed-income securities involve interest rate, credit, inflation, and reinvestment risks; and possible loss of principal. As interest rates rise, the value of fixed-income securities falls. Global investing can involve additional risks, such as the risk of currency fluctuations. Diversification can reduce (but not eliminate) the risk of loss. Past performance does not guarantee future results.