



Customer Privacy Policy Notice

Accurate Wealth Management

In November of 1999, Congress enacted the Gramm-Leach-Bliley Act (GLBA). The GLBA requires certain financial institutions, such as investment adviser firms, to protect the privacy of customer information. In situations where a financial institution does disclose customer information to non-affiliated third parties, other than permitted or required by law, customers must be given the opportunity to opt out or prevent such disclosure. **Accurate Wealth Management** does not share or disclose customer information to non-affiliated third parties except as permitted or required by law.

Accurate Wealth Management is committed to safeguarding the confidential information of its clients. **Accurate Wealth Management** holds all personal information provided by clients in the strictest confidence and it is the objective of **Accurate Wealth Management** to protect the privacy of all clients. Except as permitted or required by law, **Accurate Wealth Management** does not share confidential information about clients with non-affiliated parties. In the event that there were to be a change in this policy, **Accurate Wealth Management** will provide clients with written notice and clients will be provided an opportunity to direct **Accurate Wealth Management** as to whether such disclosure is permissible.

To conduct regular business, **Accurate Wealth Management** may collect personal information from sources such as:

- Information reported by the client on applications or other forms the client provides to **Accurate Wealth Management**
- Information about the client's transactions implemented by **Accurate Wealth Management** or others
- Information developed as part of financial plans, analyses or investment advisory services

To administer, manage, service and provide related services for client accounts, it is necessary for **Accurate Wealth Management** to provide access to customer information within the firm and to non-affiliated companies, (*optional to include examples of outside firms*), with whom **Accurate Wealth Management** has entered into agreements. To provide the utmost service, **Accurate Wealth Management** may disclose the information below regarding customers and former customers, as necessary, to companies to perform certain services on **Accurate Wealth Management's** behalf.

- Information *Accurate Wealth Management* receives from the client on applications (name, Social Security number, address, assets, etc.)
- Information about the client's transactions with *Accurate Wealth Management* or others (account information, payment history, parties to transactions, etc.)
- Information concerning investment advisory account transactions
- Information about a client's financial products and services transaction with *Accurate Wealth Management*

Since *Accurate Wealth Management* shares non-public information solely to service client accounts, *Accurate Wealth Management* does not disclose any non-public personal information about *Accurate Wealth Management*'s customers or former customers to anyone, except as permitted by law. However, *Accurate Wealth Management* may also provide customer information outside of the firm as required by law, such as to government entities, consumer reporting agencies or other third parties in response to subpoenas. In the event that *Accurate Wealth Management* has a change to its customer privacy policy that would allow it to disclose non-public information not covered under applicable law, *Accurate Wealth Management* will allow its clients the opportunity to opt out of such disclosure.