

PRIVACY POLICY

Fiscal Wisdom Wealth Management values the trust you place in us as your Investment Advisor. As a part of our relationship, we respect and acknowledge your privacy. Federal regulations require that we provide you with notice of our policies and procedures regarding the disclosure of your nonpublic personal information. Our policies relating to disclosure of non-public personal information are as follows:

We collect non-public personal information about you from the following sources:

1. Information we receive from you on new account applications or other forms;
2. Information about your transactions with us; and
3. Information we receive from consumer reporting agencies.
4. We do not disclose nonpublic personal information about current or former clients to nonaffiliated third parties except as permitted or required by law..
5. We restrict access to non-public personal information about you to our employees and agents of Fiscal Wisdom Wealth Management who need to know that information to provide services to you, and we require all such employees and agents to adhere to our privacy policies and procedures. Furthermore, Fiscal Wisdom Wealth Management complies with applicable federal privacy regulations.

We maintain physical, electronic, and procedural safeguards designed to protect your nonpublic personal information in accordance with applicable federal standards.

We do not permit third-party service providers to use your nonpublic personal information to market their products or services to you, including, but not limited to, information concerning your income and net worth, your credit score, and your account history with Fiscal Wisdom Wealth Management.

We may share your nonpublic personal information with service providers as necessary to service your account, including custodians, technology providers, and other vendors, provided that such parties are required to maintain the confidentiality of your information.

If you have any questions about these policies or our use, maintenance, and disclosure of your nonpublic personal financial information, please contact our Operations Department at (860) 673-1942. We will provide you with a copy of this Privacy Policy at least annually, as required by law.