

Privacy Policy

Protecting your privacy is important to Legacy Advisors and our associates. We want you to understand what information we collect and how we use it. In order to provide our clients with a broad range of financial products and services as effectively and conveniently as possible, we use technology to manage and maintain client information. The following notice serves as a standard for all Legacy Advisors associates for collection, use, retention and security of non-public personal information.

We Collect Nonpublic Personal Information About You From The Following Sources

We may collect "non-public personal information" about you from applications or other account forms; from information about your transactions with others or us.

We may also request further information from you to verify your identification (ID) when required by federal law.

What Information We Disclose

We do not disclose any non-public information about you to anyone, except as permitted by law.

If you decide to close your account(s) or become an inactive client, we will continue to adhere to the privacy policies and practices described in this notice.

Our Security Procedures

We also take steps to safeguard client information. We restrict access to your personal and account information to those associates who need to know that information to provide products or services to you.

Associates who violate these standards will be subject to disciplinary measures. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your non-public personal information.

Hyperlinks to Other Sites

The privacy practices of linked web sites are not covered by Legacy Advisors's privacy notice and we are not responsible for the privacy practices, data collection, security or content of other web sites. You should always look for and review a site's privacy notice before giving out any personal information.

Disclosing Our Privacy Commitment to You

If you have any questions about how Legacy Advisors protects your confidential information, please call our office at 844-687-5342.

www.lapwm.com