



# BENCHMARK FINANCIAL

**Your Financial Life.**  
Integrated. Organized. Simplified.

## PRIVACY POLICY

### Benchmark Financial Wealth Advisors, LLC

2401 NW Boca Raton Blvd.

Boca Raton, FL 33431

(561) 416-2992 - [clientservices@benchmarkfinancial.info](mailto:clientservices@benchmarkfinancial.info)

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Investment advisers are required by law to inform their clients of their policies regarding privacy of client information. Federal law gives the customer the right to limit some but not all sharing of personal information. It also requires us to tell you how we collect, share, and protect your personal information.

#### TYPES OF NONPUBLIC PERSONAL INFORMATION (NPI) WE COLLECT

While using our service, we may ask you to provide us with certain personally identifiable information that can be used to contact or identify you ("Personal Data").

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. This can include but is not limited to: your First name and Last name, Email address, Phone number, Cookies and Usage Data, Social Security Number, Date of Birth, Banking Information, Financial Account Numbers and/or Balances, Sources of Income, and Credit Card Numbers or Information.

#### INFORMATION COLLECTION AND USE

We use your data to provide and improve our service. By using our service, you agree to the collection and use of information in accordance with this policy.

We collect several different types of information for various purposes to provide and improve our service to you.

## **PARTIES TO WHOM WE DISCLOSE INFORMATION**

All Investment Advisers may need to share personal information to run their everyday business. In the section below, we list the reasons that we may share your personal information:

- For everyday business purposes – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus;
- For our marketing – to offer our products and services to you;
- For joint marketing with other financial companies;
- For our affiliates' everyday business purposes – information about your transactions and experiences and information about your creditworthiness; or
- For affiliates and non-affiliates to market to you.

If you are a new customer we may begin sharing your information on the day you sign our agreement. When you are no longer our customer, we may continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.

## **PROTECTING THE CONFIDENTIALITY OF CURRENT AND FORMER CLIENT'S INFORMATION**

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards and secured files and building.

## **PERSONAL DATA**

We may use your Personal Data to contact you with newsletters, marketing or promotional materials and other information that may be of interest to you. You may opt out of receiving any, or all, of these communications from us by following the unsubscribe link or instructions provided in any email we send or by contacting us.

## **USE OF DATA**

Benchmark Financial Wealth Advisors LLC, and all affiliates, use the collected data for various purposes:

- To provide and maintain our service
- To notify you about changes to our service
- To allow you to participate in interactive features of our service when you choose to do so
- To provide customer support
- To detect, prevent and address technical issues
- To provide you with news and general information about other goods, services and events which we offer that are similar to those that you have already purchased or enquired about unless you have opted not to receive such information

## **USAGE DATA**

We may also collect information on how the service is accessed and used ("Usage Data"). This Usage Data may include information such as your computer's Internet Protocol address (e.g. IP address), browser type, browser version, the pages of our service that you visit, the time and date of your visit, the time spent on those pages, unique device identifiers and other diagnostic data.

## **TRACKING COOKIES DATA**

We use cookies and similar tracking technologies to track the activity on our service and hold certain information.

Cookies are files with small amounts of data which may include an anonymous unique identifier. Cookies are sent to your browser from a website and stored on your device. Tracking technologies also used are beacons, tags, and scripts to collect and track information and to improve and analyze our service.

You can instruct your browser to refuse all cookies or to indicate when a cookie is being sent. However, if you do not accept cookies, you may not be able to use some portions of our service.

Examples of Cookies we use:

- **Session Cookies.** We use Session Cookies to operate our service.
- **Preference Cookies.** We use Preference Cookies to remember your preferences and various settings.
- **Security Cookies.** We use Security Cookies for security purposes.

## **LEGAL BASIS FOR PROCESSING PERSONAL DATA UNDER GENERAL DATA PROTECTION REGULATION (GDPR)**

If you are from the European Economic Area (EEA), Benchmark Financial Wealth Advisors LLC, and all affiliates, legal basis for collecting and using the personal information described in this Privacy Policy depends on the Personal Data we collect and the specific context in which we collect it.

Benchmark Financial Wealth Advisors LLC, and all affiliates, may process your Personal Data because:

- We need to perform a contract with you
- You have given us permission to do so
- The processing is in our legitimate interests and it's not overridden by your rights
- To comply with the law

## **RETENTION OF DATA**

Benchmark Financial Wealth Advisors LLC, and all affiliates, will retain your Personal Data only for as long as is necessary for the purposes set out in this Privacy Policy. We will retain and use your Personal Data to the extent necessary to comply with our legal obligations (for example, if we are required to retain your data to comply with applicable laws), resolve disputes, and enforce our legal agreements and policies.

Benchmark Financial Wealth Advisors LLC, and all affiliates, will also retain Usage Data for internal analysis purposes. Usage Data is generally retained for a shorter period of time, except when this data is used to strengthen the security or to improve the functionality of our service, or we are legally obligated to retain this data for longer time periods.

## **TRANSFER OF DATA**

Your information, including Personal Data, may be transferred to — and maintained on — computers located outside of your state, province, country or other governmental jurisdiction where the data protection laws may differ than those from your jurisdiction.

If you are located outside the United States and choose to provide information to us, please note that we transfer the data, including Personal Data, to the United States and process it there.

Your consent to this Privacy Policy followed by your submission of such information represents your agreement to that transfer.

Benchmark Financial Wealth Advisors LLC, and all affiliates, will take all steps reasonably necessary to ensure that your data is treated securely and in accordance with this Privacy Policy and no transfer of your Personal Data will take place to an organization or a country unless there are adequate controls in place including the security of your data and other personal information.

## **DISCLOSURE OF DATA**

### **Disclosure for Law Enforcement**

Under certain circumstances, Benchmark Financial Wealth Advisors LLC, and all affiliates, may be required to disclose your Personal Data if required to do so by law or in response to valid requests by public authorities (e.g. a court or a government agency).

### **Legal Requirements**

Benchmark Financial Wealth Advisors LLC, and all affiliates, may disclose your Personal Data in the good faith belief that such action is necessary to:

- To comply with a legal obligation
- To protect and defend the rights or property of Benchmark Financial Wealth Advisors LLC, and all affiliates
- To prevent or investigate possible wrongdoing in connection with the service
- To protect the personal safety of users of the service or the public
- To protect against legal liability

### **Security of Data**

The security of your data is important to us, but remember that no method of transmission over the Internet, or method of electronic storage is 100% secure. While we strive to use commercially acceptable means to protect your Personal Data, we cannot guarantee its absolute security.

### **"Do Not Track" Signals Under California Online Privacy Protection Act (CalOPPA)**

We do not support Do Not Track ("DNT"). Do Not Track is a preference you can set in your web browser to inform websites that you do not want to be tracked. You can enable or disable Do Not Track by visiting the Preferences or Settings page of your web browser.

### **Your Data Protection Rights Under General Data Protection Regulation (GDPR)**

If you are a resident of the European Economic Area (EEA), you have certain data protection rights. Benchmark Financial Wealth Advisors LLC, and all affiliates, aim to take reasonable steps to allow you to correct, amend, delete, or limit the use of your Personal Data.

If you wish to be informed what Personal Data we hold about you and if you want it to be removed from our systems, please contact us.

In certain circumstances, you have the following data protection rights:

**The right to access, update or to delete the information we have on you.** Whenever made possible, you can access, update or request deletion of your Personal Data directly within your account settings section. If you are unable to perform these actions yourself, please contact us to assist you.

**The right of rectification.** You have the right to have your information rectified if that information is inaccurate or incomplete.

**The right to object.** You have the right to object to our processing of your Personal Data.

**The right of restriction.** You have the right to request that we restrict the processing of your personal information.

**The right to data portability.** You have the right to be provided with a copy of the information we have on you in a structured, machine-readable and commonly used format.

**The right to withdraw consent.** You also have the right to withdraw your consent at any time where Benchmark Financial Wealth Advisors LLC, and all affiliates, relied on your consent to process your personal information.

Please note that we may ask you to verify your identity before responding to such requests.

You have the right to complain to a Data Protection Authority about our collection and use of your Personal Data. For more information, please contact your local data protection authority in the European Economic Area (EEA).

### **SERVICE PROVIDERS**

We may employ third party companies and individuals to facilitate our service ("Service Providers"), to provide the service on our behalf, to perform service-related services or to assist us in analyzing how our service is used.

These third parties have access to your Personal Data only to perform these tasks on our behalf and are obligated not to disclose or use it for any other purpose.

### **LINKS TO OTHER SITES**

Our service may contain links to other sites that are not operated by us. If you click on a third party link, you will be directed to that third party's site. We strongly advise you to review the Privacy Policy of every site you visit.

We have no control over and assume no responsibility for the content, privacy policies or practices of any third party sites or services.

### **CHILDREN'S PRIVACY**

Our service does not address anyone under the age of 18 ("Children"). We do not knowingly and without parental consent, collect personally identifiable information from anyone under the age of 18. If you are a parent or guardian and you are aware that your child has provided us with Personal Data, please contact us. If we become aware that we have collected Personal Data from children without verification of parental consent, we take steps to remove that information from our servers.

### **CHANGES TO THIS PRIVACY POLICY**

We may update our Privacy Policy from time to time. We will notify you of any changes by posting the new Privacy Policy via our website and sending a copy to you directly by email or mail.

We will let you know via email and/or a prominent notice on our website, prior to the change becoming effective and update the "effective date" at the top of this Privacy Policy.

You are advised to review this Privacy Policy periodically for any changes. Changes to this Privacy Policy are effective when they are posted.

### **Contact Us**

If you have any questions about this Privacy Policy, please contact us:

- By email: [clientservices@benchmarkfinancial.info](mailto:clientservices@benchmarkfinancial.info)
- By visiting this page on our website: <https://benchmarkfinancial.info/contact>
- By phone number: 561-416-2992
- By mail: 2401 NW Boca Raton Blvd, Boca Raton FL 33431, United States

### **FEDERAL LAW GIVES YOU THE RIGHT TO LIMIT SHARING – OPTING OUT**

Federal law allows you the right to limit the sharing of your NPI by “opting-out” of the following: sharing for non-affiliates’ everyday business purposes – information about your creditworthiness; or sharing with affiliates or non-affiliates who use your information to market to you. State laws and individual companies may give you additional rights to limit sharing.

***Please notify us immediately if you choose to opt out of these types of sharing.***

### **DEFINITIONS**

Affiliates – companies related by common ownership or control. They can be financial and non-financial companies; Non-affiliates – companies not related by common ownership or control. They can be financial and non-financial companies; Joint marketing – a formal agreement between non-affiliated financial companies that together market financial products or services to you.

*Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.*