



Privacy Policy Statement

At Pursuit Wealth Planning, protecting the privacy and confidentiality of our clients' personal information is a responsibility we take seriously. We collect and maintain personal information only as necessary to provide financial planning, investment advisory, and related services to our clients.

We do not sell personal information. We do not share, sell, rent, or disclose clients' personal information to third parties for marketing or promotional purposes.

We may share information only when necessary to service client accounts, fulfill requested services, comply with applicable laws and regulations, or work with trusted service providers who assist us in operating our business. These parties are required to protect the confidentiality and security of client information.

Mobile phone numbers, SMS opt-in information, and messaging consent will not be sold or shared with third parties or affiliates for their marketing or promotional purposes.

We may use service providers to help operate our text messaging system, but they may use information only as necessary to provide those services on our behalf.

We maintain physical, electronic, and procedural safeguards designed to protect personal information from unauthorized access or disclosure.

Our commitment is simple: your information is used to help us serve you—not to market to you.