

Privacy Policy

Veritas Wealth Management, LLC As of October 4, 2018

Veritas Wealth Management, LLC (VWM) is committed to client confidentiality and to protect your privacy. The following information is provided, as required by law, to help you understand our privacy policy and how we will handle and maintain confidential personal information as we fulfill our obligations to protect your privacy. “Personal information” refers to the nonpublic financial information obtained by VWM in connection with carrying out our services.

Information We Collect

VWM collects personal information as part of our relationship to you to provide client services and fulfill legal and regulatory requirements. The type of information VWM collects may include:

- Information VWM receives from you on forms (such as name, address, Social Security number, profile documents, assets and income)
- Information you provide VWM directly about your personal finances or personal circumstances or which VWM may receive from brokerage statements or other information you authorize VWM to receive

Information Disclosed in Administering Products and Services

VWM will not disclose personal information about current or former clients to nonaffiliated third parties except as permitted or required by law. VWM does not sell any personal information about you to any third party. VWM will not disclose personal information without your authorization, except as required or permitted by law.

Procedures to Protect Confidentiality and Security of Your Personal Information

VWM has procedures in place that limit access to personal information to those employees who need to know such information in order to perform business services. In addition, VWM maintains physical, electronic and procedural safeguards to guard your nonpublic personal information.

VWM will update its policy and procedures when necessary to ensure that your privacy is maintained and that VWM conducts business in a way that fulfills our commitment to you. If VWM makes any material changes in its privacy policy, we will make that information available to clients through our Web site and/or other communications.