

PRIVACY NOTICE
(Information Security Program) of
Power Wealth Management LLC

This is for your information only. No action is required on your part.

At Power Wealth Management LLC protecting your privacy is very important to us. We want you to understand what information we collect and how we use it. We collect and use “nonpublic private information” in order to provide our clients with a broad range of financial services as effectively and conveniently as possible. We treat nonpublic personal information in accordance with our privacy policy.

“Nonpublic personal information” is nonpublic information about you that we obtain in connection with providing a financial service or product to you.

What Information Do We Collect?

In order to fulfill our obligations to you, we need certain information. Generally, this includes your name, address, telephone number, social security number, date of birth, account numbers, transaction information, and information about your income and financial situation. We may also have access to other sensitive information, such as credit scores, income tax information and so forth.

Where Do We Get This Information?

We may collect nonpublic personal information about you from a variety of sources, such as:

- Information we receive from you on applications or other forms;
- Information about your transactions with us, our affiliates or others, such as the custodian(s) of your account(s); and
- Information we receive from non-affiliated third parties, including credit reporting agencies.

What Information Do We Disclose and To Whom Do We Disclose It?

We share your personal information for our everyday business purposes such as to process your transactions, maintain your accounts(s), respond to court orders and legal investigations, and to assist with us with our regulatory compliance obligations. Such sharing cannot be limited by the consumer.

We share common ownership with Power Protection Strategies, an insurance agency. We share client information with Power Protection Strategies.

In the event that there were to be a change in this policy that would allow us to disclose nonpublic information not covered under applicable law, we will provide you with written notice and you will be provided an opportunity to direct us as to whether such disclosure is permissible. This applies to current as well as former clients.

Our Security Procedures

We maintain physical, electronic and administrative safeguards to protect your nonpublic personal information. This includes measures to protect your information in the course of its disposal.