

Purpose Wealth

invest on purpose

Privacy Policy

Purpose Wealth Management is committed to keeping your information confidential. In the course of our business, we collect non-public personal information about clients and prospects from account applications, client information gathering forms, etc. We do not sell your personal information to anyone. We do not disclose your personal information to anyone, unless one of the following exceptions applies:

1. We will disclose your personal information if required by law for regulators or law enforcement authorities.
2. We disclose your personal information to custodians and brokers that are necessary to effect or administer transactions you authorize or request.
3. We disclose your personal information to other third parties only when asked to do so by you.
4. We will disclose your personal information to family members only when asked to do so by you or in the event you become incapacitated and are no longer able to handle your financial affairs and you have previously provided the firm with written authorization.
5. We will disclose your personal health related information to an insurance provider or agent for the purpose of getting an insurance quote for you only if you specifically opt in by instructing us to do so in writing.
6. Third party contractors will have access to the firm's files from time to time when it is necessary to assist the firm with the management of its business processes. All third party contractors working in this capacity will be required to sign confidentiality agreements or have a confidentiality clause in their service agreement and to abide by our Privacy Policy.

We maintain physical, electronic, and procedural safeguards to protect all client personal information, and we restrict access to this information. Employees have access to your personal information for business purposes only.

If at any time in the future it becomes necessary to change this policy, you will get advance written notice of the proposed change and the opportunity to opt out.