

Bennett Associates Wealth Management

Privacy Notice

Bennett Associates Wealth Management is committed to client confidentiality and the protection of 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 non-public financial information obtained by Bennett Associates Wealth Management in connection with carrying out our services.

Information We Collect

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

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

Information Disclosed in Administering Products and Services

Bennett Associates Wealth Management discloses personal information about current or former clients to non-affiliated third-parties for everyday business purposes, such as maintaining your account(s), entering trade orders or to respond to court orders or legal investigations. Bennett Associates Wealth Management does not sell any personal information about you to any third-party, nor do we share any personal information, including mobile opt-in information, with other financial companies for joint marketing purposes.

Procedures to Protect Confidentiality and Security of Your Personal Information

Bennett Associates Wealth Management 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, Bennett Associates Wealth Management maintains physical, electronic and procedural safeguards to guard your non-public personal information.

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