Privacy Policy

We view protecting your private information as a top priority. Pursuant to applicable privacy requirements, we have instituted policies and procedures to ensure that we keep your personal information private and secure.

We do not disclose any non-public personal information about you to any non-affiliated third parties, except as permitted by law. In the course of servicing your account, we may share some information with our service providers, such as transfer agents, custodians, broker-dealers, accountants, consultants, and attorneys.

We restrict internal access to non-public personal information about you to employees, who need that information in order to provide products or services to you. We maintain physical and procedural safeguards that comply with regulatory standards to guard your non-public personal information and to ensure our integrity and confidentiality. We will not sell information about you or your accounts to anyone. We do not share your information unless it is required to process a transaction, at your request, or required by law.

We restrict access to your personal and account information to those employees who need to know that information in order to provide products and services to you. We maintain physical, electronic, and procedural safeguards to protect your nonpublic information.

The privacy policies and practices described in this notice will be maintained in the event you become an inactive customer or decide to close your account.

If, at any time in the future, it is necessary to disclose any of your personal information in a way that differs with this policy, we will give you advance notice of the proposed change and an opportunity to decline such disclosure.

You will receive a copy of our privacy notice prior to or at the time you sign an advisory agreement with our firm. Thereafter, we will deliver a copy of the current privacy policy notice to you on an annual basis.

Wealth Engagement is committed to protecting the confidentiality of your personal information. Let us know if you have any questions by contacting us at (917) 826-5955 or (404) 795-6124.