Privacy Policy

Our Privacy Commitment to You. When you work with a financial services professional to develop a financial plan or purchase an insurance or investment product, you may share highly personal information about your health, assets, income, estate, business and family. The information we collect is critical to providing superior products and service. But we recognize that protecting the privacy and security of this information is an important responsibility.

The following information will help you understand our privacy policy and how we will handle and maintain confidential customer information to fulfill our obligation to protect your privacy. You are receiving this notice because you are a True Financial Wealth Management Firm, LLC ™ customer, or considering becoming our customer. This notice describes True Financial Wealth Management Firm's practices and policies for handling your personal financial information.

What Information Do We Collect? We collect personal information to help us serve your financial needs, offer new products and services, provide customer service and fulfill legal and regulatory requirements. "Personal information" refers to nonpublic personal financial and health information we obtain from you in connection with providing you with a financial product or service. We may obtain this information directly from you or from other sources.

The type of information that we collect varies, based on the products or services involved. It may include:

- Information we receive from you on applications and related forms, such as name, address, social security number, assets and income;
- Information about your transactions and relationships with us and our affiliates, such as products or services purchased, account balances and payment history;
- Information we receive from consumer reporting agencies, such as credit relationships and history, and;
- Information we receive from third parties in order to issue and service your policies, such as motor vehicle reports and medical information.

What Information Do We Disclose? True Financial Wealth Management Firm, LLC ™ may disclose your non-public personal information as part of servicing and maintaining your policy, contract or account, and for other legally required and permitted purposes.

In the normal course of business, we may share personal information with persons or entities involved in servicing and administering products and services on our behalf. These could include: your agent or broker, insurance companies, consumer reporting agencies, medical consultants, firms assisting in administration of policies and claims, companies that perform marketing services on our behalf or other financial institutions with whom we have joint marketing agreements, and other service providers and affiliates assisting us.

We will not disclose personal information about current or former customers to non-affiliated third parties, except as permitted or required by law. We do not sell any personal information about you to any third party.

How Do We Protect the Confidentiality of Your Information? True Financial Wealth Management Firm, LLC ™ has procedures in place that limit access to personal information to employees, representatives and service providers who need to know the information to perform business services or market products on our behalf. We also educate our employees about the importance of protecting the privacy and security of confidential personal information. Finally, we maintain physical, electronic and procedural safeguards that comply with federal and state regulations to guard your personal information.

Please Contact Us With Any Questions. Confidentiality is an established hallmark of True Financial Wealth Management Firm, LLC ™ business. We understand the need to safeguard the personal information that you disclose to us, and we have an established tradition of discretion and respect for our customers' privacy. We reinforce this daily in the way we routinely handle sensitive client information as part of our normal business operations.

We will update our policies and procedures when necessary to ensure that your privacy is maintained and that we conduct our business in a way that fulfills our commitment to you. If we make any material changes in our privacy policy, we will provide our customers with an updated notice. Additionally, the privacy policy will be delivered to our clients annually. If you have any questions about True Financial Wealth Management Firm's privacy policy, please contact us at **520-318-1288 or 1-800-380-3359.**