

## **PRIVACY POLICY**

McGuire 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 McGuire Wealth Management in connection with carrying out our services.

### **Information We Collect**

McGuire 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 McGuire Wealth Management collects may include:

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

### **Information Disclosed In Administering Products and Services**

McGuire 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.. McGuire 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. McGuire Wealth Management will not disclose personal information without your authorization, except as required or permitted by law. Clients may opt out from our sharing of information with the aforementioned outside parties by notifying us by telephone, mail, fax, email or in person.

### **Procedures to Protect Confidentiality and Security of Your Personal Information**

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

McGuire Wealth Management will update its policy and procedures when necessary to ensure that your privacy is maintained and that McGuire Wealth Management conducts business in a way that fulfills our commitment to you. If McGuire Wealth Management makes any material changes in its privacy policy, we will make that information available to clients through our Web site and/or other communications. If you have any questions about our practices, or more specifically about our privacy policy, please contact us at (401) 364-5000 and we will be happy to give you additional detail.