



## Privacy Policy

We collect personal information to open your account(s), to process your transactions and to help us provide a better level of service. We do not sell your personal information to anyone. We protect the security and confidentiality of the personal information we collect.

We do not sell your personal or account information to anyone; such information can be separated into the following categories:

**Personal Information** - This information may include things such as your name, address, phone number, social security number, marital status, your occupation and employer, your tax bracket, or information you provided us on the new account application.

**Information Regarding Your Account History** - As part of establishing a business relationship with you, we collect and maintain information regarding your investment transactions and other activities such as your account balance, payments, withdrawals, account activity, and correspondence with you.

We do not disclose personal information to third parties for marketing purposes and would disclose such only via the following limited exceptions:

We disclose personal information to companies that facilitate our business relationship with you (i.e. - the custodian of your assets that works on your behalf), the ability to conduct our business (i.e. - persons working on our information technology) or as requested by you (i.e. - your CPA or tax attorney).

We may disclose or report personal information in limited circumstances where we believe in good faith the disclosure is required or permitted under law (i.e. - cooperating with regulators, law enforcement, or in compliance with a subpoena).

### How Do We Protect the Confidentiality of Your Personal Information?

We restrict access to nonpublic personal information about you to our employees on a need to know basis for that information. Our employees are bound by a code of ethics and are subject to disciplinary action if they fail to follow this code.

We also maintain physical, electronic, and procedural safeguards that comply with federal and industry standards to guard your nonpublic personal information.

If our policy on disclosing information ever changes, we will promptly notify you in writing.

If, at any time in the future, it is necessary to disclose any of your personal information in a way that is inconsistent with this policy, we will give you advance notice of the proposed change so that you will have the opportunity to opt-out of such disclosure.

We continue to evaluate our efforts to protect personal information and make every effort to keep your personal information accurate and up to date. If you identify an inaccuracy in your personal information, need to make changes to that information, or have any other questions or concerns, please call us at (952) 829-0000, or contact us by e-mail at [info@usadvisorswealth.com](mailto:info@usadvisorswealth.com).

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