

# NEWMYER

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## WEALTH MANAGEMENT

### **The Privacy Policy of Newmyer Wealth Management**

At Newmyer Wealth Management, your personal privacy is extremely important. We have always considered the protection of sensitive information to be a foundation of customer trust and a sound business practice. We must obtain certain information about you to serve you the best. However, we take every step we possibly can to protect and secure your personal and private information. This Privacy Policy applies to the relationships of clients or former clients with the office of Newmyer Wealth Management in the United States.

We provide our Privacy Policy to clients at the beginning of the relationship and annually thereafter. If a change is made to our Privacy Policy, we will notify you.

We are very serious about protecting the privacy of client information. We maintain safeguards that comply with federal standards to store and secure information we have about you. The safeguards may be physical, electronic or procedural. The safeguards protect against unauthorized access, alteration, and destruction.

#### **How we may collect information about you**

We collect information about you primarily from the forms, applications and agreements used as we conduct business with you. Other information may be collected through information and documents you provide us during our relationship. The typical information we collect about you would include, but not be limited to, your name, address and contact information. We may also collect information pertaining to your age, occupation, marital status, extensive financial information (i.e., source of wealth, investment experience and objectives, risk tolerance), credit history and personal identification such as your Social Security Number.

#### **How we use information about you**

We use the information we have about you in the ways described below. We do so to give you better service and provide you with products and services which compliment your needs.

#### **We share information for legal and routine business reasons**

We may disclose information we have about you as permitted by law. For example, we may share information with regulators and law enforcement who have jurisdiction over us or if we are required to do so by United States or other applicable law. We may provide information to protect against fraud. We may share information with your consent.

We may also disclose your personal information to non-affiliated companies that assist Newmyer Wealth Management in providing services to you. They are required to maintain the confidentiality of such information to the extent they receive it, and to use your personal information only in the course of providing such services and only for the purposes that Newmyer Wealth Management dictates.

#### **We use information to deliver products and services**

Newmyer Wealth Management offers many financial products and services, directly or indirectly, through Charles Schwab & Co, Inc. and Victorian Finance, LLC, A Mortgage Lender. They include wealth planning and strategy, brokerage services, investment management and mortgage lending. The information we have about you, as described above, is used by Newmyer Wealth Management in order to make available to you all of the products and services available. Using your information in this way may result in improved client service, deeper relationship and long-term benefits based on a complete knowledge of your financial situation.

Have confidence that Newmyer Wealth Management will never sell your personal information.