

Your Privacy Matters

At Wealthspan Investment Management, protecting your personal information is one of our highest priorities. This notice explains what information we collect, how we use it, and when we may share it.

Information We Collect

We may collect information such as:

- Name, address, phone number
- Social Security or Tax ID number
- Date of birth
- Employment information
- Income and net worth
- Investment objectives
- Account balances
- Transaction history

How We Use Your Information

We use your information to:

- ✓ Open and maintain your accounts
- ✓ Provide investment advice
- ✓ Process transactions
- ✓ Meet regulatory and legal obligations
- ✓ Protect against fraud

Sharing Your Information

We may share information for...	Can you limit this?
Everyday business purposes	No
Marketing our services	No
Affiliates' transaction purposes	No
Joint marketing	We don't share
Non-affiliates marketing	We don't share

How We Protect Your Information

We maintain administrative, technical, and physical safeguards designed to protect your personal information from unauthorized access or use.

Questions?

Phone: (616) 655-1696