

Privacy Policy

U.S. Private Wealth, LLC (“USPW”) has designed this privacy policy to protect the confidentiality of information we receive about our current and former clients.

Collecting Information

USPW collects nonpublic personal information about you to help us serve your financial needs, administer and update accounts, reduce fraud and other risks, provide customer service, offer new products or services, and fulfill legal and regulatory requirements. We collect your personal information to support our normal business operations and to service your account.

In order to service your account, USPW may collect nonpublic personal, financial and health information from the following sources:

- Information on applications and related forms, or provided by you in person or over the phone such as name, address, Social Security number, marital status, assets and income;
- Information collected from your browser when you visit our web-site and your browser interacts with us;
- Information regarding your transactions with us or others; and
- Information we receive from consumer reporting agencies or other institutions where you conduct financial transactions.

Sharing Information

USPW will not disclose any nonpublic personal information collected about you except to nonaffiliated third parties who are solicitors for us or financial service providers, such as custodians, third-party managers and sub-managers, open and closed-end mutual fund companies, insurance companies or other companies whose products or advisory services are offered by USPW and in which you participate, as well as companies we may use to provide services to us, such as data processing companies.

USPW may also disclose nonpublic personal information we have collected about you to any investment advisory firm with whom your investment advisory representative becomes associated if he or she changes advisory firms. USPW may also disclose nonpublic personal information it has collected about you to any non-affiliated broker-dealer with whom your USPW investment advisory representative is registered. You have a right to opt out of any disclosure to such a firm by contacting USPW at (561) 855 – 4635.

We do not disclose any nonpublic personal information about our clients or former clients to any other persons, except as permitted by law or with your consent.

Protecting Information

USPW takes precautions to ensure your nonpublic personal information is protected and accessed only by authorized individuals or organizations. We maintain physical, electronic and procedural safeguards that comply with federal standards to guard your nonpublic personal information.