

PRIVACY POLICY

We Respect Your Privacy

CM Wealth Advisors LLC has always placed a high value on maintaining your trust and confidence. We believe that confidence must be earned and validated through time. In today's world, when technology facilitates widespread sharing of information, trust must be reinforced by our sincere pledge to take the steps necessary to ensure that the information you share with us is treated with respect and confidentiality.

Our Pledge to Our Clients

- We collect only the information we need to service your account and administer our business.
- We are committed to keeping your information confidential and we place strict limits and controls on the use and sharing of your information.
- We make every effort to ensure the accuracy of your information.

We Collect the Following Nonpublic Personal Information about You

- Information we receive from you on applications or other forms, correspondence, or conversations, including, but not limited to, your name, address, phone number, social security number, assets, income and date of birth; and
- Information about your transactions with us, our affiliates, or others, including, but not limited to, your account numbers and balances, payment history, parties to transactions, cost basis information, and other financial information.

Categories of Information We Disclose and Parties to Whom We Disclose

We do not disclose any nonpublic personal information about our current or former clients to nonaffiliated third parties, except as required by law (for example, for tax reporting or under court order) or to other organizations and individuals with your consent (for example, to your attorney or tax professional) or except as described below:

We place strict limits and controls on the use and sharing of your information.

- We restrict access to nonpublic personal information about you to authorized employees who need the information to administer your business.
- We maintain physical, electronic and procedural safeguards to protect this information by complying with this Privacy Policy, industry practices, and federal regulations. We emphasize the importance of information security through our compliance manual, this Privacy Policy, and the contracts and agreements that we sign with external suppliers. We safeguard information by regularly assessing security standards and procedures to protect against unauthorized access to personal information.