PIERCE
WEALTH PARTNERS

PRIVACY POLICY STATEMENT

We consider it our great privilege to serve your financial needs and we value the trust you have placed in us. An important component of our relationship with you is our commitment to safeguarding your personal information. This notice will help you understand the measures we take to protect the privacy and security of this information.

GATHERING INFORMATION

When providing financial products or services, we may obtain public and non-public information about you from applications, forms, and other sources that you provide to us, whether in writing, in person, by telephone, electronically or by any other means which could include consumer reporting agencies. This information may include your name, address, date of birth, social security number, employment information, income and credit references, or credit history. The information in Pierce Wealth Partners (PWP) client files will be used only to provide our clients with the products and services we offer.

SECURITY STANDARDS

- We will safeguard, according to strict standards of security and confidentiality, any personally identifiable information (PII) our clients share with us.
- We continually monitor and review our internal processes, computer networks, third-party vendors, and procedural safeguards.
- Each PWP employee must agree to abide by our confidentiality policy when hired and thereafter on an annual basis. We permit only authorized employees to have access to your personal information. Employees who violate our confidentiality policy will be subject to our normal disciplinary process, up to and including termination.
- We select very carefully the outside companies that provide services on our behalf and restrict the information we provide them to that which is necessary to fulfill their responsibilities or offer a service to you. These companies are prevented by legal agreement from using client information for their own purposes or selling this information to others.
- We do not sell client lists or individual client information, nor do we make your information available for use by unaffiliated third parties.
- When required to produce information based on a “lawful right to know” (e.g., a subpoena or a government regulatory request from the IRS or Department of Justice), we will provide only the required information and nothing more.

MAINTENANCE OF ACCURATE INFORMATION

We strive to maintain complete and accurate information about you and your accounts at all times. Should you determine that our records contain inaccurate or incomplete information about you or your accounts, please contact us immediately so we may resolve any gaps or inaccuracies as quickly as possible.

REGARDING AMENDMENTS AND FORMER CLIENTS

We reserve the right to amend our policy from time to time and will notify you of any significant changes. If you decide to close your account(s) or become an inactive client, we will continue to adhere to the privacy policies as set forth in this Statement, subject to future revisions.

QUESTIONS, CONTACT US

We welcome the opportunity to answer additional questions you may have. Please contact your PWP Financial Professional at 817-732-2442 or write to us at Pierce Wealth Partners, Inc., 6300 Ridglea Place #615, Fort Worth, TX 76116. At all times, you may view our current privacy policy on our website at www.piercewealth.com.