

TRUSTSTONE WEALTH PARTNERS, LLC

PRIVACY POLICY

At TrustStone Wealth Partners, LLC (“TrustStone”), we deeply value the trust our clients place in us, especially when it comes to the privacy and security of their personal information.

Our Privacy Policy outlines our approach to handling your non-public personal information. It is designed to keep your data confidential and securely protected, allowing us to use or disclose it solely for the purpose of delivering our services to you or as otherwise permitted by law. This policy applies equally to both our current and former clients, ensuring that your privacy is respected and maintained at all times.

INFORMATION WE COLLECT

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. This can include but is not limited to your Name and Address, Contact Information, Social Security Number, Date of Birth, Assets, Income, Account Balances, and/or Transaction History.

HOW WE USE & DISCLOSE YOUR INFORMATION

All financial companies need to share client personal information to run their everyday business. We use your information to provide our financial services to you. We may also use your contact information to market our products and services to you, subject to your consent.

We use Constant Contact for our email and SMS marketing communications. Information shared through Constant Contact is limited to your name and contact information. For more information about how we may use your contact information with Constant Contact, see Constant Contact’s Customer Data Notice available at <https://www.constantcontact.com/legal/customer-contact-data-notice>.

We may disclose your information to third parties as permitted by law, including the broker/dealers, administrators, custodians, accountants, attorneys, or others authorized by you. From time to time, we may be required to give information about our business to regulatory authorities, which may include personal information about you. We do not sell your personal information to anyone.

HOW INFORMATION IS SAFEGUARDED

We have procedures in place that are designed to protect the security and confidentiality of client information. To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards, secured files and buildings, and strict confidentiality policies.

YOUR OPT OUT RIGHTS

You have the option to decline to provide your personal information, however, certain information may be required in order to provide certain services. If you do not provide the information requested, we may not be able to provide those services.

If you wish to unsubscribe from our email campaigns, please click on the Unsubscribe link at the bottom of any marketing email sent from us. If you wish to stop receiving text messages from us, reply STOP, QUIT, CANCEL, OPT-OUT, or UNSUBSCRIBE to any text message sent from us.

CONTACT INFORMATION

If you have any questions, concerns or comments about our privacy policy, you may call us at 919-913-8191 or email us at info@truststonewealth.com.