

Privacy Disclosure Document

CPAs and financial advisors, like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. RW Wealth has been and will continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. RW Wealth's primary client goal is to protect your privacy.

Types of Nonpublic Personal Information We Collect

To conduct regular business, we may collect nonpublic personal information from sources such as applications, tax returns, or other forms you provide to us.

Parties to Whom We Disclose Information

For current and former clients, RW Wealth does not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees and, in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

Information Safeguarding

RW Wealth will internally safeguard your nonpublic personal information by restricting access to only those employees who provide products or services to you or those who need access to your information to service your account. In addition, we will maintain physical, electronic, and procedural safeguards that meet federal and/or state standards to guard your nonpublic personal information.

Please call if you have any questions as your privacy, our professional ethics, and the ability to provide you with quality financial and tax services are very important to us.