

Moneywise, Inc. Privacy Policies and Practices

At Moneywise, Inc., protecting the privacy and confidentiality of your personal information is important to us. As a financial services firm, we know that your trust in us is critical, and we greatly value that trust.

In order to offer our clients the advice and asset management services that they desire, we must collect and maintain information that is often times personal in nature. “Nonpublic personal information” is information about you that we obtain in connection with providing a service to you and that cannot be found in public sources. For example, this includes information such as your social security number, date of birth, financial account numbers and balances, sources and amounts of income, as well as other personal information.

Automatically Collected Information: When you visit our website, we may collect certain information automatically, including your IP address, browser type, operating system, pages visited, and the time and date of your visit. We may use cookies and similar tracking technologies to collect this information.

Moneywise, Inc. takes the security of your personal information seriously and we implement reasonable measures to protect it from unauthorized access, use, or disclosure. We restrict employee access to client information to only those who have a business reason to know such information, and we educate our employees about the importance of confidentiality and client privacy.

We do not sell your personal information. We may share your information in the following circumstances:

With Service Providers: We may share your information with third-party vendors or professionals who perform services on your behalf.

For Legal Reasons: We may disclose your information if required to do so by law or in response to valid requests by public authorities.

We do not share your SMS consent or phone number with any third party.

If you have any questions or concerns about our privacy policies and practices, please contact us and we would be glad to discuss them with you.

We may update this Privacy Policy from time to time. We will notify you of any changes by posting the new Privacy Policy on our website main page with a new effective date. We also provide the current policy to clients by mail or email annually to comply with regulatory policy.