

## **MARTIN WEALTH MANAGEMENT'S PRIVACY POLICY**

Protecting your privacy is very important to MARTIN WEALTH MANAGEMENT. We are committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us.

The categories of nonpublic information that we collect from you may include information about your personal finances, information about your health to the extent that it is needed for the financial planning process, information about transactions between you and third parties, and information from consumer reporting agencies, e.g., credit reports. We use this information to help you meet your personal financial goals.

With your permission, we disclose limited information to attorneys, accountants, and other professionals with whom you have established a relationship. You may opt out from our sharing information with these nonaffiliated third parties by notifying the firm at any time by mail or in person. MARTIN WEALTH MANAGEMENT will share a limited amount of information about you with the custodian in order to execute securities transactions on your behalf.

We maintain a secure office to ensure that your information is not placed at unreasonable risk. We maintain physical, electronic and procedural safeguards to guard your non-public personal information.

We do not provide your personal information to mailing list vendors or solicitors. We ask third parties for confidentiality in our agreements with unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors. Federal and state securities regulators may review our Company records and your personal records as permitted by law.

Personally identifiable information about you will be maintained while you are a client, and for the required period thereafter that records are required to be maintained by federal and state securities laws. After that time, information may be destroyed.

We will notify you in advance if our privacy policy is expected to change. We are required by law to deliver this *Privacy Notice* to you annually, in writing.