

**PRIVACY POLICY NOTICE**

**FACTS**

**WHAT DOES BUCK WEALTH STRATEGIES, LLC DO WITH YOUR PERSONAL INFORMATION?**

**Why?**

Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

**What?**

The types of personal information we collect and share depends on the product or service you have with us. This information can include, but is not limited to:

- Social Security number and income;
- Assets and transaction history; and
- Investment experience and risk tolerance.

When you are *no longer* our client, we continue to share your information as described in this notice.

**How?**

All financial companies need to share clients’ personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients’ personal information; the reasons Buck Wealth Strategies, LLC chooses to share and whether you can limit this sharing.

Reasons we can share your personal information	Does Buck Wealth Strategies, LLC ?	Can you limit this sharing?
<b>For our everyday business purposes–</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	YES	NO
<b>For our marketing purposes–</b> to offer our products and services to you	NO	We do not share
<b>For joint marketing with other financial companies</b>	NO	We do not share
<b>For our affiliates’ everyday business purposes–</b> information about your transactions and experiences	NO	We do not share
<b>For our affiliates’ everyday business purposes–</b> information about your creditworthiness	NO	We do not share
<b>For our affiliates to market to you</b>	YES	YES
<b>For non-affiliates to market to you</b>	NO	We do not share

**To limit our sharing**

**Please note:**

Certain states have adopted a requirement for you to approve the sharing of information in advance, otherwise known as an “opt-in” choice. If you live in an “opt-in” state (e.g., California, Massachusetts, Maine, Alaska, North Dakota or Vermont), then Buck Wealth Strategies, LLC will require your consent to share your information with unaffiliated third parties who are not servicing your account. State requirements vary and may change without notice.

If you are a new client, we can begin sharing your information from the date we sent this notice. When you are no longer our client, we continue to share your information as described in this notice.

However, you can contact us at any time to make changes to your privacy settings.

**Questions?**

Call: 888-210-6567

## Who we are

Who is providing this notice?

Buck Wealth Strategies, LLC

## What we do

How does Buck Wealth Strategies, LLC protect my personal information?

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.

How does Buck Wealth Strategies, LLC collect my personal information?

We collect your personal information, for example, when you

- open an account or give us contact information
- enter into an investment adviser contract or give us your income information
- tell us about your investment or retirement portfolio

We also collect your personal information from other companies.

Why can't I limit all sharing?

Federal law gives you the right to limit only

- sharing for affiliates' everyday business purposes—information about your creditworthiness
- affiliates from using your information to market to you
- sharing for non-affiliates to market to you

State laws and individual companies may give you additional rights to limit sharing

What happens when I limit sharing for an account I hold jointly with someone else?

Your choices will apply to everyone on your account—unless you tell us otherwise.

## Definitions

**Affiliates**

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- *E.A. Buck Enterprises*
- *E.A. Buck Accounting & Tax Services*
- *E.A. Buck Insurance, Inc.*
- *LTCPRO, LLC*

**Non-affiliates**

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- *NONE*

**Joint marketing**

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- *NONE*

**Other Important Information**

By signing Buck Wealth Strategies, LLC Agreement, I acknowledge that I have fully read and understand this Privacy Policy and opt-in as outlined above. I understand that if I have any questions or concerns about this policy, it is my responsibility to discuss this with my financial professional.