

FACTS

WHAT DOES SWAINE & LEIDEL WEALTH SERVICES, 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 depend on the product or service you have with us. This information can include:

- Social Security number and
- and
- and

How?

All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons Swaine & Leidel Wealth Services, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Swaine & Leidel Wealth Services, LLC share?	Can you limit this sharing?
For our everyday business purposes – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations or report to credit bureaus		
For our marketing purposes – to offer our products and services to you.		
For our affiliates' everyday business purposes – information about your transactions and experiences		
For our affiliates' everyday business purposes – Information about your creditworthiness		
For our affiliates to market to you		
For nonaffiliates to market to you		

Questions?

Please contact Will Swaine by e-mail at will@wealthsl.com or by phone at (863) 385-1101

What we do

How does Swaine & Leidel Wealth Services, 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 collect my personal information?

We collect your personal information, for example, when you

- or
- or
-

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 nonaffiliates to market to you

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

Definitions

Affiliates

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

Swaine & Leidel Wealth Services, LLC does not share with our affiliates.

Nonaffiliates

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

Swaine & Leidel Wealth Services, LLC does not share with nonaffiliates so they can market to you.

Joint marketing

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

Swaine & Leidel Wealth Services, LLC doesn't jointly market

Other important information

Not Applicable.