

# Stronghold Wealth Management

## 2023 Privacy Notice

We feel strongly about protecting your non-public personal information. We value the trust and confidence you place in us everyday and are committed to safeguarding your client information.

This notice explains how Stronghold Wealth Management, LLC collects, shares and protects your non-public personal information. Please review this notice carefully.

### **Information We May Collect**

As a function of our role as your investment advisor, Stronghold Wealth Management, LLC may collect the following types of information about you:

- Information necessary to complete applications to open investment accounts including your name, mailing address, social security number, date of birth, phone numbers, email addresses, etc.
- Personal information regarding your assets, liabilities, income, expenses, financial goals, and investment objectives

### **Non-Disclosure of Client Information**

Stronghold Wealth Management, LLC maintains safeguards to comply with federal and state standards to guard each client's non-public personal information ("NPI"). Stronghold Wealth Management, LLC does not share any NPI with any nonaffiliated third parties, except in the following circumstances:

- As necessary to provide the service that the client has requested or authorized, or to maintain and service the client's account;
- As required by regulatory authorities or law enforcement officials who have jurisdiction over Stronghold Wealth Management, LLC, or as otherwise required by any applicable law;
- To the extent reasonably necessary to protect the confidentiality or security of the financial institution's records against fraud and for institutional risk control purposes; and
- To provide information to the firm's attorney, accountants and auditors or others determining compliance with industry standards.

When NPI is shared with an outside company we prohibit those companies from disclosing or using the NPI for any other purpose other than to carry out the purposes for which the NPI was shared. We do not share any NPI information with any outside companies for their use of marketing products or services to our clients. We have established electronic and procedural safeguards to protect your NPI and will not sell your NPI to anyone.