



Privacy Notice

WHO WE ARE	
Who is providing this notice?	<p>Jacksonville Wealth Management, LLC, a registered investment advisor.</p> <p>We do not have any affiliates under common ownership or control, but our investment advisor representatives may also be representatives or agents of other companies including LPL Financial, and insurance or banking companies.</p>

FACTS	What does Jacksonville Wealth Management do with your personal information?
How does Jacksonville Wealth Management protect my personal information?	We are required by federal law to protect your confidential information from unauthorized access and use. We use administrative and technical methods to protect your information, including rules and procedures and computer safeguards.
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.
How does Jacksonville Wealth Management collect my personal information?	<p>We collect your personal information, for example, when you:</p> <ul style="list-style-type: none"> • Open an account • Apply for insurance • Seek advice about your investments • Enter into an investment advisory agreement • Tell us about your investment or retirement portfolio <p>We also collect information from others, such as when the custodian holding your assets is authorized by you to send us updates about your portfolio.</p>
What?	<p>The types of personal information we collect can include:</p> <ul style="list-style-type: none"> • Social Security Number • Income • Assets • Investment experience • Account transactions • Retirement Assets
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 Jacksonville Wealth Management chooses to share personal information and whether you can limit this sharing.
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only:</p> <ul style="list-style-type: none"> • 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.



REASONS WE CAN SHARE YOUR PERSONAL INFORMATION	Does Jacksonville Wealth Management 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.	Yes	No
For our marketing purposes to offer products and services to you.	No	We don't share
For joint marketing with other financial companies	No	We don't share
For our affiliates' everyday business purposes – information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes – information about your creditworthiness	No	We don't share
For nonaffiliates to market to you – for clients with accounts established with Jacksonville Wealth Management representatives at banks or credit unions	No	We don't share
For nonaffiliates to market to you – for clients with accounts established with Jacksonville Wealth Management independent representatives.	No	We don't share
* If your representative terminates his or her relationship with us and moves to another brokerage or investment advisory firm, we or your representative may disclose your personal information to the new firm unless you instruct us not to by contacting us at 904-923-7526.		

DEFINITIONS	What does Jacksonville Wealth Management do with your personal information?
Affiliates	Companies related by common ownership or control. They can be financial or nonfinancial companies. Jacksonville Wealth Management does not have any affiliates under common ownership or control, but our investment advisor representatives may also be representatives or agents of other companies including LPL Financial, and insurance or banking companies.
Nonaffiliates	Companies not related by common ownership or control. They can be financial or nonfinancial companies. Jacksonville Wealth Management does not share with nonaffiliates so they cannot market to you
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you: This may include banks, credit unions, or other financial institutions with which we have a joint marketing agreement.

QUESTIONS?	For more information, go to www.jaxwealth.com or contact Chief Compliance Officer, Daniel Ciez, 904-923-7526, dan@jaxwealth.com .
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