PRIVACY POLICY

Pariter Wealth Management Group and its affiliates, Pariter Securities LLC and Pariter Risk Management LLC, are committed to respecting your privacy.

This Privacy Policy tells you what information we collect, how we use it and how we protect it.

We value your trust and our Privacy Policy is based on the following guiding principles;

- We do not sell information about you.
- We do not share your information for marketing purposes with anyone.

INFORMATION WE COLLECT

As part of our regular operation, we may obtain non-public information ("NPI") about you to provide you with the products and services you have requested. We may collect NPI from you, from your transactions with us, and from outside parties such as doctors, labs, other health providers and from consumer-reporting agencies. This NPI may include:

- Your name, address, phone number, social security number, and e-mail address;
- Income assets, policies, and accounts with others;
- Tax Returns, wills and trusts;
- Family data, current and past medical history;
- Information about transactions or experiences with us or other financial institutions; and
- Medical or health data as permitted or required by law.

We may use your date in order to:

- Process transactions or claims;
- Respond to your requests;
- Determine eligibility for coverage;
- Prevent fraud;
- Comply with regulatory requirements; and
- Share related products and services we offer.

INFORMATION WE DISCLOSE

Disclosures to Unaffiliated Third Parties

We do not disclose NPI to outside parties for marketing purposes. We will share NPI with outside parties only as allowed by law. If such disclosure is made, it will be made only to provide you with the products and services that you have requested from us or to administer these products and services. Examples of the outside parties to whom we may disclose NPI include:

- Independent agents;
- Brokerage firms or mutual fund firms;
- Insurance companies; and
- Service providers for our businesses.

Disclosures to Affiliates

We may disclose NPI, including "transaction or experience" information to our affiliates. For example, we may disclose NPI to our affiliates to:

- Fulfill your requests;
- Service your product; or
- Offer you other products or services of interest to you.

Disclosures to Associated Firms

Some of our owners or representatives are associated with an unaffiliated broker-dealer. This broker-dealer has possession of your NPI if you presently have a brokerage account through our representative. In the event our owner or representative should associate with a new broker-dealer, we may disclose NPI, including "transaction or experience" information, to our new broker-dealer for the purpose of requesting your permission to transfer your account to the new broker-dealer we have associated with.

Disclosures of Health Information

We may disclose health information as authorized by you, or as permitted or required by law. For example, we may disclose health information to find out if you qualify for coverage, to process claims, or to prevent fraud.

Other Disclosures Permitted by Law

We may disclose NPI as permitted or required by law. For example, we may disclose NPI to law enforcement or state insurance or health care authorities.

COMPLIANCE WITH LAW

We will comply with any additional federal or state requirements that relate to the use and protection of your NPI. For example, we may obtain your authorization before making certain kinds of disclosures. We also may give you a description of our Insurance Practices along with your application or upon request.

In those states where there are more restrictive laws, we may provide a separate notice outlining those requirements.

OUR SECURITY PROCEDURES

We maintain procedures and technology designed to prevent unauthorized access to NPI. We maintain physical electronic and procedural safeguards to protect the privacy and integrity of NPI. We restrict access to NPI to employees and others for lawful business reasons. Employees who do not comply with our Privacy Policy are subject to discipline.

WHEN WILL WE NOTIFY YOU

If you are a current customer, this Privacy Policy is available to you at any moment and a copy will be sent to you any time the policy is revised. If you no longer have a customer relationship with us, we will continue to follow our Privacy Policy and practices with regards to your information. In that event, you will not receive future Notices from us.

CHANGE IN PRIVACY POLICY

We reserve the right to change or add to our Privacy Policy at any time. If we make material changes, we will provide current customers with a notice of the revised policy. This Notice will describe our new practices.

This Privacy Policy replaces any prior privacy notices you received from us.

The terms "we," "our" or "us" when used in this Privacy Notice refer to the above company. This Privacy Notice applies to Pariter Wealth Management, LLC and its affiliates, Pariter Securities LLC and Pariter Risk Management LLC.

Please contact our office at 787-781-2555 if you would like a current copy of Forum's ADV Part II mailed to you.

PARITER WEALTH MANAGEMENT GROUP
#243 State Road #2, Guaynabo, PR 00966
Phone: 787-781-2555 Fax: 781-2612
Email: info@pariterwmg.com