

May 26, 2020

Privacy Policy

Revised 05-2020

Good afternoon –

The relationship between Investor and Advisor is one built on trust. TMG Wealth Advisors, Inc. takes your personal privacy very seriously.

Our firm’s account forms require clients to give us personal information (such as name and address), unique identifiers (such as Social Security number), financial information (such as account numbers, net worth), and demographics information (such as zip code, age, or income level). The information that is collected is used to check your qualifications for having an account and for other purposes. Unique identifiers (such as Social Security numbers) are collected for use as required by the IRS.

Our firm has physical, electronic and organizational security measures in place to protect the loss, misuse and alteration of the information under our control. We distribute the personally identifiable information only to third parties when necessary to conduct securities, investment advisory, insurance or financial planning business, or otherwise service your account(s). Please refer to Item 10 on page 9 of our ‘Firm Brochure’ to see the third-parties’ companies that we are affiliated with.

Kurt Morgan is a Registered Representative of Triad Advisors, LLC and an Investment Adviser Representative of TMG Wealth Advisors, Inc. TMG Wealth Advisors, Inc. is not a subsidiary or an affiliate of Triad Advisors, LLC, a broker-dealer. TMG Wealth Advisors, Inc. is not affiliated with Triad Advisors, LLC. As a Registered Representative & independent Investment Advisory firm, we will disclose customer information to (and receive customer information from) Triad in our working relationship with them.

What are reasons we can share your information? For our everyday business purposes. With one or more of our affiliated entities, at our sole discretion and for purposes related to services we provide you, and to nonaffiliated entities that either perform services for us or function on our behalf (such as check printing services, account aggregation providers, broker/dealers, investment companies, and insurance companies).

We do not distribute or publicly post personally identifiable information.

We restrict access to personal information to our employees, affiliates and associated persons that need to know that information to provide service to you. When we use other companies to provide services to you, we require them to protect the confidentiality of the personal information they receive.

Thank you for the opportunity to serve you. If you have any questions about this privacy statement or the practices of our firm, please contact us.

Sincerely,

TMG Wealth Advisors, Inc.

Registered Investment Advisor

(503) 533-4929 

Mail@TMGWealth.net 
www.TMGWealth.net

14631 SW Millikan Way #17 
Beaverton, OR 97003