

WINDERMERE WEALTH ADVISORS, LLC
PRIVACY POLICY NOTICE

1. This Notice is intended to describe how we collect, maintain and disclose customer information. This Notice may be amended from time to time at our discretion. If you have any questions or comments about the privacy of information concerning you or your account information, please contact us at (414) 759.7824.
2. We collect non-public personal information about you from the following sources:
 - Information we receive from you on applications, agreements or other forms; and
 - Information about your transactions with us or others.
3. We do not disclose any non-public information about you to anyone, except as required by law and except to service providers, such as brokers executing purchase and sales orders for your account and providers of safekeeping or accounting services to the extent needed to provide their services.
4. If you decide to close your account(s) or become an inactive client, we will adhere to the privacy policies and practices as described in this Notice.
5. We restrict access to your personal and account information to those employees who need to know that information to provide products or services to you. We maintain physical, electronic and procedural safeguards that comply with federal standards to guard your non-public personal information.