



## Privacy Policy

Investment Advisers are required by law to inform their clients of their policies regarding privacy of client information. We are bound by professional standards of confidentiality that are even more stringent than those required by law. Federal law gives customers the right to limit some but not all sharing of personal information. It also requires us to tell you how we collect, share and protect your personal information.

### **Types of Personal Information We Collect**

Timmons Wealth Management collects nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. This information can include but is not limited to your Name, Address, Email Address, Social Security Number, Date of Birth, Driver's License Information, Sources of Income, Employment Information, Investments, Account Balances, Investment Objectives, Risk Tolerance, Historical Transactions, Account Numbers and/or Other Information.

Timmons Wealth Management will NEVER sell client information to any third party, and only collects personal information through our website when you voluntarily provide it. When you are no longer our customer, we may continue to share your information only as described in this notice. Timmons Wealth Management may use the information collected to offer you other services that we provide which may meet your needs.

### **Parties to Whom We Disclose Information**

We treat all information about current and former clients in a highly confidential manner. All Investment Advisers may need to share personal information to run their everyday business. Employees of Timmons Wealth Management may access and share your personal information with third parties only when performing specific services for you. These everyday business purposes may include but are not limited to processing your transactions, maintaining your account(s), responding to court orders and legal investigations, or where explicitly authorized by you in writing as it relates to providing information to external parties such as attorneys or accountants. Timmons Wealth Management WILL NOT share nonpublic personal information about you with outside companies (affiliates or non-affiliates) except in the course of everyday business when performing specific services for you as outlined above.

### **Protecting the Confidentiality of Current & Former Client's Information**

To protect your personal information from unauthorized access and use, Timmons Wealth Management has implemented security measures that comply with federal and state laws, including information sharing safeguards, user restricted access privileges, computer and technology safeguards, vendor due diligence, ongoing threat detection measures and staff training. A copy of Timmons Wealth Management's Information Security Policy is available to clients upon request.

### **Changes to our Privacy Policy**

You will receive a copy of our Privacy Policy at the beginning of each client relationship, and annually thereafter as long as you maintain an ongoing relationship with Timmons Wealth Management. Periodically we may revise our Privacy Policy, and will provide you with a revised policy if the changes materially alter the previous Privacy Policy. We will not, however, revise our Privacy Policy to permit the sharing of non-public personal information other than as described in this notice unless we first notify you and provide you with an opportunity to prevent the information sharing.

### **Questions**

Please contact us if you have any questions. Your privacy, our professional ethics and the ability to provide you with quality financial services are very important to us. You may contact our office with any questions or concerns regarding our Privacy Policy via phone at (774) 331-2172.