

Privacy Policy

AW does everything possible to provide clients with peace of mind. This privacy notice applies to all current and former customers who have shared information with us. AW know you have entrusted us with your financial information and we are committed to safeguarding that private information.

Categories of Information We collect

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. This can include but is not limited to your Social Security Number, Date of Birth, Banking Information, Financial Account Numbers and/or Balances, Sources of Income, and Credit Card Numbers or Information. When you are no longer our customer, we may continue to share your information only as described in this notice.

Categories of Information We Disclose

We will not sell your information at any time for any reason. do not disclose any nonpublic personal information about our clients to any affiliated or nonaffiliated third parties, accept with the clients written consent. In the course of servicing your account, we may share some information with our service providers, such as transfer agents, or custodians.

Categories of Parties to Whom We Disclose Information

We do not and will not sell your personal information to anyone at any time. We disclose non-public personal information about you to third parties that assist us in processing those transactions you have either requested or authorized. These third parties may include accountants, attorneys, bankers, mortgage brokers, real estate agents, and property and casualty agents, custodian banks and other financial intermediaries. At times, we may present limited information about a client and their financial situation to a third-party professional with whom the adviser consults and has entered into a confidentiality agreement to complete the work necessary for development of the client's investment strategy.

All Investment Advisers may need to share personal information to run their everyday business. In the section below, we list the reasons that we may share your personal information:

- For 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;
- For our marketing – to offer our products and services to you;
- For joint marketing with other financial companies;
- For our affiliates' everyday business purposes – information about your transactions and experiences and information about your creditworthiness; or
- For non-affiliates to market to you.

Confidentiality and Security

We restrict internal access to nonpublic personal information about you to employees, who need that information in order to provide our services to you. We maintain electronic, physical and procedural safeguards that comply with regulatory standards to guard your nonpublic personal information and to ensure your information's integrity and confidentiality. To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards and secured files and building.