PRIVACY POLICY

Sax Wealth Advisors, LLC ("SAX Wealth Advisors" or "SAX") is committed to client confidentiality and to protect your privacy. The following information is provided, as required by law, to help you understand our privacy policy and how we will handle and maintain confidential personal information as we fulfill our obligations to protect your privacy. Personal information refers to the nonpublic financial information obtained by SAX in connection with carrying out our services.

Your personal and financial data is private information. Whether you are an existing client or considering a relationship with us, protecting your privacy is our priority. In compliance with current privacy regulations SAX is required to provide you an annual notice informing you of your rights as a client and our obligations under federal privacy laws to protect information you provide to us.

INFORMATION SAX WEALTH ADVISORS, LLC COLLECTS

SAX collects personal information as part of our relationship to you, to provide client services and fulfill legal and regulatory requirements. We collect the information you voluntarily provide to us, such as if you create an account, send us an email, fill out a form, register for an event or provide or request information.

The type of information may include:

- Information SAX receives from you on forms (such as name, address, Social Security number, profile documents, assets and income);

- Information you provide SAX directly about your personal finances or personal circumstances or which SAX may receive from brokerage statements or other information you authorize SAX to receive (such as investment activity, holdings, and account balances).

SAX WEALTH ADVISORS, LLC WILL SAFEGUARD PERSONAL INFORMATION YOU PROVIDE

- You may rely on us to protect the personal and private information you have entrusted to us. Access to your personal information will be limited to those employees who need such information to provide you the services you have requested from us. SAX maintains internal physical, electronic and procedural safeguards to protect personal information about you.
- No mobile opt-in will be shared with third parties for marketing purposes.
- We may share your personal information with external companies and affiliates to carry out services you have requested or to help us service your account. All companies with whom we do business are to comply with strict standards regarding security and confidentiality, and the information can be used only for the sole purpose of providing service we have requested the company to perform.

- In accordance with any state or federal laws, we may be required to release information in certain circumstances (i.e. protection against fraud, responding to a subpoena, or reporting to a credit bureau).
- You received a copy of our privacy policy at the time your account was opened. SAX will update its policy and procedures when necessary to ensure that your privacy is maintained, and that SAX conducts business in a way that fulfills our commitment to you. If SAX makes any material changes in its privacy policy, we will make that information available to clients through our Web site and/or other communications.
- Importantly, we want to assure you that we will not sell client information to anyone. Your rights as our client are a priority to us.

AN ONGOING COMMITMENT TO YOUR PRIVACY

We are just as committed to protecting the privacy of our former clients, as we are our current clients. If you choose to close your account or become an inactive client, you will continue to be protected by the privacy policies and principles described in the policy.

THANK YOU

At SAX Wealth Advisors, LLC, your business is important to us. We promise to do our best to safeguard your financial assets and personal information about you. If at any time we can help you further, please call us at (973) 859-2199 or write us at SAX Wealth Advisors, LLC, 389 Interpace Parkway, Ste. 3, Parsippany, NJ 07054.

For more information, please contact Trevor Hodges.