

PRIVACY POLICY

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 Wealth Advisors, LLC 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

Your personal information, not available publicly, may come from various sources. Information may be learned directly from you, from brokerage statements or other information you authorize us to receive, or from information we receive from you on applications or other forms. Such information may include: social security number and/or taxpayer identification number, assets, income, account balance(s), investment activity and accounts at other institutions.

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 Wealth Advisors, LLC maintains internal physical, electronic and procedural safeguards to protect personal information about you.
- 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. We reserve the right to change our policy and will promptly notify you of any such material changes. 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 Kyle R. Stawicki, CCO/ChFC®

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