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Wealth Legacy Group®, Inc.'s Privacy Statement

Your relationship with Wealth Legacy Group®, Inc. (WLG) is based on trust and confidence. To fulfill its responsibilities to you, WLG requires you to provide us with accurate financial and personal information, including your income, social security number, health history, financial history, insurance information, asset information, life insurance documents, wills, trusts and other estate documents, tax returns, account balances and payment history. WLG will protect the information that you have provided to us in a manner that is safe, secure and professional. WLG and its employees are committed to protecting your privacy and safeguarding that information.

Safeguarding Customer Documents

Most of our client's records are kept electronically. Access to those files is limited to authorized personnel.

Sharing Nonpublic Personal and Financial Information

WLG is committed to the protection and privacy of its client's personal and financial information. WLG will not share such information with any affiliated or nonaffiliated third party except as follows:

- When necessary to complete a transaction for a client
- When required to maintain or service a client's account
- To resolve client inquiries
- With persons acting in a fiduciary or representative capacity on behalf of the client, such as accountants, lawyers, and other investment and tax professionals
- To protect against or prevent actual or potential fraud, identity theft, unauthorized transactions, claims or other liability
- To comply with federal, state or local laws, rules and other applicable legal requirements
- In any circumstances with the client's instruction or consent
- Pursuant to any other exceptions enumerated in the California Information Privacy Act

Opt-Out Provisions

WLG's policy is to refrain from sharing nonpublic personal and financial information with affiliated or unaffiliated third parties, except under the circumstances noted above. Since sharing under the circumstances noted above is necessary to service client accounts or is mandated by law, there are no allowances made for clients to opt out. Please contact us if you have any questions or concerns about this privacy statement.

"Trusted Advisor to the Exceptional Business Owner, Executive & Professional"