SVA Wealth Management, Inc.
Privacy Policy

Your privacy is very important to SVA Wealth Management, Inc. (SVA). What you share with us is often private and confidential, and we are committed to its protection. We take very seriously the responsibility to safeguard the confidentiality of client information that we obtain. SVA believes that our ability to share financial information within our companies enables us to more effectively serve our customers. This notice describes our privacy policy and describes how we treat the information we receive about you.

Information We Collect. The types of personal non-public information we may collect directly from you, or with your authorization, include:

- Identification documents or other personal information necessary to service your account in accordance with federal regulations. This information may include your social security number, date of birth, as well as details about your investments, income and expenses and other relevant financial information;
- Information we receive from custodians with respect to your account(s);
- Information received from service bureaus or other third parties.

Information We Disclose. As a general rule, we do not disclose personal information about our clients or former clients to anyone except under the following circumstances:

- To State, Federal, and other regulatory authorities as required by law or regulation.
- Other third parties in response to subpoenas or other legal process as required by law;
- At your request, we may disclose information to attorneys, accountants, securities professionals and others to assist us, or them, in providing services to you.
- To provide information to affiliates of the firm to service your account(s).
- To nonaffiliated third parties who perform services or functions for us in conjunction with our services to you. We do not authorize the third party to use or disclose the information other than for the purpose it was originally disclosed. (An example of such a disclosure is using an outside service bureau to process tax returns.)
- We may ask your permission to provide your name and phone number to a prospective client if they request a referral regarding our services.

How We Protect Your Information. Companies we may hire to provide support services are not allowed to use your personal information for their own purposes. We also maintain physical, electronic and procedural safeguards to protect information. Our employees may access information and provide it to third parties only when completing a transaction at your request or providing our other services to you. Employees and our professional service representatives are required to comply with our established information confidentiality provisions.

Additionally, SVA:

- Provides training to all employees regarding the protection and confidentiality of client information;
- Maintains physical, electronic and procedural safeguards that comply with federal standards to protect this information;
- Will not sell any information to any person or entity;
- May send clients marketing materials from any affiliate of SVA Certified Public Accountants, S.C.

Thank you for allowing us to serve you. We value your business and are committed to protecting your privacy. We hope you view our firm as your most trusted adviser, and we will work to continue earning your trust. Please call us if you have any questions or if we can be of further assistance.

SVA Wealth Management, Inc. ~ A Registered Investment Adviser ~ An Affiliate of SVA Certified Public Accountants, S.C.
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