

Privacy Notice

Wealth Management Group Privacy Policy

Wealth Management Group, LLC 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. We believe that keeping client information secure is a top priority for us at Wealth Management Group, LLC "Personal information" refers to the nonpublic financial information obtained by Wealth Management Group in connection with carrying out our services. The provisions of this notice will apply to former clients as well as current clients unless we state otherwise.

Information We Collect

Wealth Management Group collects personal information as part of our relationship to you, to provide client services and fulfill legal and regulatory requirements. The type of information Wealth Management Group collects may include:

- Information Wealth Management Group receives from you on forms (such as name, address, Social Security number, profile documents, assets and income);
- Information you provide Wealth Management Group directly about your personal finances or personal circumstances or which Wealth Management Group may receive from brokerage statements or other information you authorize Wealth Management Group to receive.

Information Disclosed In Administering Products and Services

Wealth Management Group will not disclose personal information about current or former clients to non-affiliated third parties except as permitted or required by law. Wealth Management Group does not sell any personal information about you to any third party. Wealth Management Group will not disclose personal information without your authorization, except as required or permitted by law. We may disclose any of the above information that we collect to our affiliate, Raymond F. Book & Associates, P.A. This affiliate is a full service accounting firm and shares common ownership with Wealth Management Group, LLC. We will first secure your permission in writing before the information is released to the affiliate.

Procedures to Protect Confidentiality and Security of Your Personal Information

Wealth Management Group has procedures in place that limit access to personal information to those employees who need to know such information in order to perform business services. In addition, Wealth Management Group maintains physical, electronic and procedural safeguards to guard your nonpublic personal information.

Wealth Management Group will update its policy and procedures when necessary to ensure that your privacy is maintained and that Wealth Management Group conducts business in a way that fulfills our commitment to you. If Wealth Management Group makes any material changes in its privacy policy, we will make that information available to clients through our Web site and/or other communications.