

Privacy Notification

Florida Wealth Advisors, LLC. values you, our client, and the various types of business you bring to us. You are given this notification to reassure you that Florida Wealth Advisors, LLC. respects the personal information you share with us. It is important to us that we reflect a respect for your privacy in our day-to-day policies and practices.

As you are well aware, in order to provide the financial services or products you select, it is necessary for us to gather certain information about you on the applications, agreements and / or contracts you are required to complete. The procedures we follow, to subsequently provide our financial services and / or products, include the protection of your privacy as we handle your personal information.

To Be More Specific

Florida Wealth Advisors, LLC. collects certain "nonpublic personal information" in the process of setting up financial service and / or product accounts. Information such as your name, date of birth, address, Social Security number, marital status, financial history, employment and health history may be included.

In addition, our company accumulates ongoing information as it relates to active accounts receiving services and products. Records of transactions and holdings, trade confirmations, asset balances, quarterly statements, and account history would be included in this area. We receive and maintain information from affiliated companies as it relates to the types of products and services our clients select..

Privacy Guidelines

Personal client information is shared with our staff solely for the purpose of providing the services and / or products selected. Client information is also shared with third party affiliated administrative companies and with custodial companies. The only third party companies included are those necessary for us to properly process and service your business.

Information may be shared with a non-affiliated third party as permitted or as required by law (such as with an inquiry from a government agency or regulator). Our company may also share personal information with an outside third party if we are so directed by you, with your written consent only (such as to your CPA). We maintain physical, electronic, and procedural safeguards that comply with federal standards to protect your privacy.

Overall Summary

- Florida Wealth Advisors, LLC. does not share "non-public personal information" to direct marketers or to any non-affiliated company for marketing purposes.
- We will provide a copy of our privacy notification to new clients at the establishment of their first business account.
- Upon request, we will provide clients who hold active accounts with us, a current version of this statement on an annual basis.
- The privacy of inactive client accounts will be maintained. However, privacy statements will not be sent to those clients who have no active accounts with us.
- This document was in part designed to fulfill the requirements of Regulation S-P, under Section 504 of the Gramm-Leach-Bliley Act.
- We represent and warrant that we are a properly registered Florida Limited Liability Company, acting in good faith to serve the best interests of our clients.