

[Company Name]  
[Company Address]  
[City, State, Zip Code]  
[Date]

**Subject: Annual Privacy Notice**

Dear [Client Name],

At [Company Name], protecting your personal information and maintaining your trust is our highest priority. This letter serves as your annual notification regarding our privacy policies and how we handle your personal and financial data.

**Information We Collect**

In providing wealth management services, we collect non-public personal information such as your social security number, assets, income, account balances, and transaction history. This information is gathered from your account applications, investment policy statements, and interactions with our advisors.

**How We Protect Your Information**

We maintain strict physical, electronic, and procedural safeguards to protect your data. Access is restricted only to those employees and authorized service providers who require the information to manage your accounts or provide requested services.

**Information Sharing**

We do not sell your personal information to anyone. We only share your information with third parties as permitted or required by law, such as with custodians, broker-dealers, or regulatory authorities, to facilitate your transactions and maintain your accounts.

**Reviewing Our Policy**

There have been [no changes / the following changes] to our privacy policy since our last notice. You can view the full text of our Privacy Policy at any time on our website at [Website URL] or request a printed copy by calling us at [Phone Number].

Thank you for your continued trust in our firm.

Sincerely,

[Signature]  
[Name of Firm Representative]  
[Title]