[Date]

[Client Name]
[Client Address]
[City, State, Zip Code]

Subject: Important Information Regarding Your Financial Privacy

Dear [Client Name],

At [Wealth Management Firm Name], your privacy is our highest priority. We are writing to provide you with our annual Privacy Policy notice, which explains how we collect, share, and protect your personal financial information.

Information We Collect
We collect non-public personal information about you to provide tailored financial advice and manage your accounts. This includes information from your account applications, transaction history, and communications with our advisors.

How We Use Your Information
We use your information to process transactions, maintain your accounts, and comply with legal and regulatory requirements. We do not sell your personal information to third parties.

Information Sharing
We may share your information with unaffiliated third parties only in the following circumstances:

- With service providers who assist us in servicing your accounts (e.g., custodians, clearing firms).
- To fulfill legal or regulatory requests (e.g., subpoenas, audits).
- When you provide us with written consent to share information with your CPA or attorney.

Protecting Your Information
We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your non-public personal information. Access is restricted to employees who need that information to provide products or services to you.

Your Right to Opt-Out
If you prefer that we do not disclose non-public personal information about you to non-affiliated third parties (other than those disclosures permitted by law), you may opt out by calling us at [Phone Number] or emailing [Email Address].

No action is required if you are satisfied with our current privacy practices.

Thank you for your continued trust in [Wealth Management Firm Name].

Sincerely,

[Signature]
[Name of Privacy Officer/Principal]
[Wealth Management Firm Name]