

[Wealth Management Firm Name]
[Street Address]
[City, State, Zip Code]
[Phone Number]
[Date]

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

Subject: Notice of Updates to Our Privacy Policy

Dear [Client Name],

At [Wealth Management Firm Name], we value the trust you place in us to manage your wealth and protect your personal information. We are writing to inform you of recent modifications to our Privacy Policy, effective [Effective Date].

What has changed?

We have updated our policy to better reflect our data handling practices and to ensure compliance with evolving financial regulations. The key updates include:

- [Summary of Change 1: e.g., Updated categories of information collected]
- [Summary of Change 2: e.g., Enhanced descriptions of data security measures]
- [Summary of Change 3: e.g., Changes to how we share information with third-party service providers]

How this affects you:

These changes do not require any action on your part. Your current investment strategies, account numbers, and access to our services remain unchanged. We encourage you to review the full version of the updated Privacy Policy, which is attached to this letter or available on our website at [Website URL].

Your Privacy Choices:

As always, you have the right to limit the sharing of your information in certain circumstances. If you wish to update your privacy preferences or opt-out of specific data sharing, please contact your Wealth Advisor or call our compliance department at [Phone Number].

Thank you for your continued partnership.

Sincerely,

[Signature]

[Name of Authorized Signatory]

[Title]

[Wealth Management Firm Name]