Privacy

What Does Optivise Advisory Services, LLC Do With Your Personal Information?

Financial companies may choose how they share personal information. Federal law gives consumers the right to limit some, but not all, sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this information carefully to understand how this impacts your personal information.

The types of personal information we collect and share depends on the product or service you have with us. This information can include:

- Tax Identification Number, date of birth, telephone number and listed address
- Annual income, tax bracket, account balance(s) and transaction history
- Net worth, assets and employment History

Please note, even if you are *no longer* our customer, we may continue to share your information as described in this notice.

All financial companies need to share clients' personal information in order to carry out everyday business. In the following table, we list the reasons companies may share client's personal information, as well as the reasons Optivise Advisory Services, LLC chooses to share, and whether you can limit this sharing.

WHAT DOES Optivise Advisory Services, LLC DO WITH YOUR PERSONAL INFORMATION?

Reasons we may share your personal information	Does Optivise Advisory Services LLC Share?	Can you limit this sharing?
For our everyday business purposes – i.e. to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes – To offer our products and services to you	No	We don’t share
For Joint Marketing with other financial companies	No	We don’t share
For our affiliates’ everyday business purposes – Information about your transactions and experiences	No	We don’t share
For our affiliates’ everyday business purposes – Information about your creditworthiness	No	We don’t share
For non-affiliates to market to you – For clients with accounts established with Wealth Watch Advisors’ investment adviser representatives	No*	Yes*
* While the securities industry considers you clients of Optivise Advisory Services, LLC, we understand a relationship exists between you and your financial adviser as a result of many meetings and personal, financial conversations. Accordingly, if your representative leaves Optivise Advisory Services, LLC, we permit him or her to take your account information to his or her new investment adviser in order to continue servicing your account. However**, if you do not want us to allow your representative to take your personal, non-public information, you may contact us at (855) 378-1806 and opt-out of this provision**. If you have any questions regarding this provision, you may also contact us at the number above.		
QUESTIONS?	**Call: (855) 378-1806**	