



## **LURIE DAVIS WEALTH MANAGEMENT**

**\*INVESTMENTS\*FINANCIAL PLANNING\*INSURANCE\*BUSINESS CONSULTATION**

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### LDWM EXHIBIT (B) PRIVACY STATEMENT

**FACTS** WHAT DOES LDWM DO WITH YOUR PERSONAL INFORMATION?

**WHY?** Financial companies choose how they share your 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 notice carefully to understand what we do.

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

- \*Social Security number and income
- \*account balances and transaction history
- \*asset and risk tolerance

When you are no longer our customer, we continue to share your information as described in this notice.

**HOW?** All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons LDWM chooses to share; and whether you can limit this sharing.

REASONS WE CAN SHARE YOUR PERSONAL INFORMATION	DOES LDWM SHARE?	CAN YOU LIMIT THIS SHARING?
For our everyday business purposes - As permitted by law	YES	NO
For our marketing purposes - to offer our Products and services to you	NO	We do not share
For joint marketing with other financial Companies	NO	We do not share
For our affiliates' everyday business purposes - Information about your transactions and Experiences	NO	We do not share
For our affiliates' everyday business purposes - Information about your creditworthiness	NO	We do not share
For non-affiliates to market to you	NO	We do not share



## **LURIE DAVIS WEALTH MANAGEMENT**

LDWM EXHIBIT (B), continued  
PRIVACY STATEMENT

### **WHO WE ARE**

Who is providing this  
Notice?

Lurie Davis Wealth Management (LDWM)

### **WHAT WE DO**

How does LDWM protect  
My personal information?

We collect your personal information, for example, when  
you:

- \*seek advice about your investments
- \*enter into an investment advisory contract
- \*tell us about your investment or retirement portfolio
- \*tell us about your investment or retirement earnings
- \*give us your contact information

We also collect your personal information from other companies

Why can't I limit all sharing?

Federal law gives you the right to limit only:

- \*sharing for affiliates' everyday business purposes –  
Information about your creditworthiness
- \*affiliates from using your information to market to you
- \*sharing for non-affiliates to market to you

State laws and individual companies may give you additional rights  
To limit sharing.

### **DEFINITIONS**

Affiliates

Companies related by common ownership or control.  
They can be financial and nonfinancial companies.

- \*LDWM is affiliated with Lurie Davis Insurance Agency

Non-affiliates

Companies not related by common ownership or control. They can be  
financial and non-financial companies.

- \*LDWM share with Lurie Davis Insurance Agency

Joint Marketing

A formal agreement between nonaffiliated financial companies  
That together market financial products or services to you.

- \*LDWM jointly market with Lurie Davis Insurance Agency

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