

## PRIVACY POLICY

## JANUARY 2025

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

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 LLC chooses to share; and whether you can limit this sharing.

REASONS WE CAN SHARE YOUR PERSONAL **DOES** CAN YOU INFORMATION LDWM LLC SHARE? LIMIT THIS

SHARING?

For our everyday business purposes -YES NO

As permitted by law

For our marketing purposes - to offer our NO We do not share

Products and services to you



| For joint marketing with other financial Companies   | NO | We do not share |
|--|----|-----------------|
| For our affiliates' everyday business purposes -<br>Information about your transactions and<br>Experiences | NO | We do not share |
| For our affiliates' everyday business purposes -<br>Information about your creditworthiness                | NO | We do not share |
| For non-affiliates to market to you  | NO | We do not share |

WHO WE ARE Who is providing this

Notice?

Lurie Davis Wealth Management LLC, ("LDWM LLC")

WHAT WE DO How does LDWM LLC 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.

Non-affiliates Companies not related by common ownership or control. They can be

financial and non-financial companies. LDWM LLC share with Mutual

Fund companies.

Joint Marketing A formal agreement between nonaffiliated financial companies that

together market financial products or services to you.

\*LDWM LLC. NONE