

# Privacy Policy Notice

**Effective Date:** August 19, 2025

Three Cord True Wealth Management (“Company,” “we,” “our,” or “us”) values the trust you place in us and is committed to protecting your privacy. This Privacy Policy explains how we collect, use, share, and safeguard your information when you interact with us, including through our website, client portals, and financial advisory services.

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## 1. Information We Collect

We may collect both **personal information** and **non-personal information**, including:

- **Personal Information:** Name, address, phone number, email, Social Security number, financial account numbers, investment objectives, income, net worth, and other information necessary to provide advisory and brokerage services.
  - **Website Data:** IP address, browser type, device information, and cookies or tracking technologies.
  - **Third-Party Information:** Data provided by custodians, broker-dealers, and technology providers we partner with to serve your accounts.
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## 2. How We Use Your Information

We use the information we collect to:

- Provide investment advisory, brokerage, and financial planning services.
  - Process transactions and maintain your accounts.
  - Comply with regulatory obligations.
  - Communicate with you about your accounts, services, and updates.
  - Improve our website, services, and client experience.
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## 3. Information Sharing and Disclosure

We do **not** sell your personal information. We may share information only as permitted or required by law, including with:

- **Custodians, broker-dealers, and financial institutions** to execute transactions.

- **Service providers and vendors** (e.g., technology, compliance, or marketing firms) under confidentiality agreements.
  - **Regulators, auditors, or legal authorities** when required by law or regulatory obligation.
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## 4. Data Security

We maintain physical, electronic, and procedural safeguards to protect your personal information. Access is restricted to employees and service providers who need it to perform their duties.

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## 5. Your Rights and Choices

Depending on your state or country of residence, you may have rights to:

- Request access to or correction of your personal information.
- Opt out of certain data sharing practices.
- Request deletion of your personal data (subject to legal and regulatory recordkeeping requirements).

To exercise your rights, please contact us at [team@3CTrueWealth.com](mailto:team@3CTrueWealth.com).

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## 6. Cookies and Online Tracking

Our website may use cookies or similar technologies to improve functionality and analyze website traffic. You may adjust your browser settings to disable cookies, though some features may not function properly.

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## 7. Third-Party Links

Our website may contain links to third-party websites. We are not responsible for the privacy practices or content of these external sites.

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## 8. Children's Privacy

Our services and website are not directed to children under the age of 13, and we do not knowingly collect personal information from children under 13. If we become aware that we have inadvertently received personal information from a child under 13 without verifiable parental consent, we will delete such information from our records. If you believe we may have collected information from a child under 13, please contact us immediately at [team@3CTrueWealth.com](mailto:team@3CTrueWealth.com).

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## **9. Changes to this Privacy Policy**

We may update this notice from time to time. The revised version will be posted on our website with the effective date updated.

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## **10. Acceptance of Terms**

Through the use of this website, you are hereby accepting the terms and conditions stipulated within the aforementioned Privacy Policy Agreement. If you are not in agreement with our terms and conditions, then you should refrain from further use of our sites. In addition, your continued use of our website following the posting of any updates or changes to our terms and conditions shall mean that you are in agreement and acceptance of such changes.

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## **11. Contact Us**

If you have any questions about this Privacy Policy, please contact us at:

**Three Cord True Wealth Management**

535 Third Street, Beaver, PA 15009

Email: [team@3CTrueWealth.com](mailto:team@3CTrueWealth.com)

Phone: 724-683-3450

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