

PRIVACY DISCLOSURE POLICY

Omega Wealth Management, LLC's primary client goal is to protect your privacy.

To conduct regular business, we may collect nonpublic personal information from sources such as:

- Information reported by you on applications or other forms you provide to us
- Information about your transactions with us, our affiliates, or others

As the Firm shares nonpublic information solely to service our client accounts, we do not disclose any nonpublic personal information about our customers or former customers to anyone, except as permitted by law.

To provide the utmost in service, we may disclose the information below regarding customers and/or former customers, as necessary, to companies and financial institutions to perform certain services on our behalf, with our clients' permission and/or as required by law.

- Information the firm receives from clients on applications (name, social security number, address, assets, etc.)
- Information about client transactions with our firm or others (account information, payment history, parties to transactions, etc.)
- Information regarding other assets & liabilities, insurance policies, and legal documents.

At times, we may disclose nonpublic personal information to affiliated third parties. We may share any of the information that we collect as described above. We may disclose nonpublic personal information about you to the following types of affiliated third parties:

- Financial service providers such as mortgage brokers, insurance companies, or broker dealers
- Insurance agents, financial planning support resources, accountants, attorneys and other professionals based on the work that our clients have asked us to perform, or that we believe is needed as part of our relationship with our clients.

Information Safeguarding

Omega Wealth Management will internally safeguard your nonpublic personal information by restricting access to only those employees who provide services to you or those who need access to your information to service your account. In addition, we will maintain physical, electronic and procedural safeguards that meet federal and/or state standards to guard your nonpublic personal information. These safeguards may include shredding of information once used, passwords and encrypted websites, as well as physically securing our office files and client information.