



Private Wealth Management

5330 Carroll Canyon Rd
Suite 100
San Diego, CA 92121
Phone: (619) 350-1944
Fax: 619-937-3705

Privacy Policy

Below is the Adviser's Privacy Policy regarding client personal information.

The Adviser:

- a) Collects non-public personal information about its clients from the following sources:
 - Information received from clients on applications or other forms;
 - Information about clients' transactions with the Adviser, its affiliates, and others;
 - Information received from our correspondent clearing broker with respect to client accounts;
 - Medical information submitted as part of an insurance application for a traditional life or variable life policy; and
 - Information received from service bureaus or other third parties.
- b) The Adviser will not share such information with any affiliated or nonaffiliated third party except:
 - When necessary to complete a transaction in a customer account, such as with the clearing firm or account custodians;
 - When required to maintain or service a customer account;
 - To resolve customer disputes or inquiries;
 - With persons acting in a fiduciary or representative capacity on behalf of the customer;
 - With rating agencies, persons assessing compliance with industry standards, or to the attorneys, accountants, and auditors of the firm;
 - In connection with a sale or merger of the Adviser's business;
 - To protect against or prevent actual or potential fraud, identity theft, unauthorized transactions, claims, or other liability;
 - To comply with federal, state, or local laws, rules, and other applicable legal requirements;
 - In connection with a written agreement to provide investment management or advisory services when the information is released for the sole purpose of providing the products or services covered by the agreement; and
 - In any circumstances with the customer's instruction or consent.
- c) Restricts access to confidential client information to individuals who are authorized to have access to confidential client information and need to know that information to provide services to clients.
- d) Maintains physical, electronic, and procedural security measures that comply with applicable state and federal regulations to safeguard confidential client information.

Investment advisory services are provided through Integrated Advisors Network LLC ("Integrated"), an SEC Registered Investment Adviser. Registration does not imply a certain level of skill or training. Copper Crest Advisors, LLC is a practice group and dba of Integrated. Tax, accounting and other CPA services are provided through Copper Crest CPAs LLP. Insurance services and products are provided through Copper Crest Insurance Services LLC, California license number 0N14947.