

Privacy Policy

Effective Date: [Insert Date]

At Three Strand Wealth Partners, LLC ("Three Strand," "we," "us," or "our"), we are committed to protecting your privacy and ensuring the confidentiality of your personal information. This Privacy Policy explains how we collect, use, share, and protect your information when you interact with our services.

1. Information We Collect

We may collect the following types of personal information in the course of providing our financial services:

- **Personal Identification Information:** Name, address, phone number, email address, Social Security number, date of birth, and other personally identifiable information.
- **Financial Information:** Account balances, investment holdings, income, expenses, tax information, and other financial details necessary for us to provide financial planning and advisory services.
- **Online Interaction Data:** Information collected through cookies, web beacons, and other tracking technologies when you visit our website.

2. How We Use Your Information

The personal information we collect is used to:

- Provide financial planning and advisory services.
- Fulfill our legal and regulatory obligations.
- Communicate with you regarding updates, changes to your portfolio, or other service-related matters.
- Improve our services and website functionality.

3. Information Sharing

We do not sell or share your personal information with third parties for marketing purposes. However, we may share your information in the following circumstances:

- **With Service Providers:** We may share your information with trusted third-party service providers that assist us in conducting our business, such as custodians, financial institutions, or IT service providers, as necessary to facilitate the delivery of our services.
- **As Required by Law:** We may disclose your information when required by legal or regulatory authorities.
- **With Your Consent:** We may share your information with third parties if you provide us with explicit consent to do so.

4. Data Security

We are committed to safeguarding your personal information. We implement industry-standard physical, electronic, and procedural measures to protect your data from unauthorized access, disclosure, or misuse.

5. Your Rights

You have the right to:

- Access, update, or correct the personal information we hold about you.
- Withdraw consent for us to process your data, where applicable.
- Request the deletion of your personal information, subject to regulatory retention requirements.

To exercise these rights, please contact us using the contact details provided below.

6. Cookies and Tracking Technologies

Our website may use cookies and similar technologies to enhance user experience, analyze website traffic, and improve our services. You can control cookie settings through your browser preferences.

7. Changes to This Policy

We reserve the right to modify this Privacy Policy at any time. Any changes will be posted on our website with an updated effective date.

8. Contact Us

If you have any questions or concerns regarding this Privacy Policy or how we handle your personal information, please contact us at:

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