

Privacy Policy

Effective Date: 1/15/2026

SBW Consulting (“SBW,” “we,” “our,” or “us”) is committed to protecting your privacy and handling personal information with the discretion and care expected of a strategic advisory firm serving high-net-worth individuals, families, and professional advisors.

This Privacy Policy explains how we collect, use, store, and protect information you provide when engaging with our website, materials, or services.

Information We Collect

We may collect personal information you voluntarily provide, including but not limited to:

- Name, email address, phone number, and professional details
- Information submitted through contact forms, consultation requests, or document downloads
- General website usage data collected through standard analytics tools

We do **not** intentionally collect sensitive personal data unless voluntarily provided for strategic discussion purposes.

How We Use Information

Information collected is used solely to:

- Respond to inquiries and requests
- Evaluate potential advisory alignment
- Communicate regarding services, insights, or requested materials
- Improve website functionality and user experience

SBW does **not** sell, rent, or trade personal information.

Strategic Advisory & Third-Party Coordination

SBW Consulting operates as a **strategic advisory and coordination firm**. With your consent or as part of an engagement, information may be shared with trusted third-party professionals (such as attorneys, CPAs, advisors, or consultants) **solely for coordination purposes**.

We do not control the privacy practices of independent third parties and encourage you to review their policies directly.

Cookies & Analytics

Our website may use cookies or similar technologies to support functionality and analytics. These tools help us understand how visitors interact with our site but do not personally identify users.

You may adjust browser settings to disable cookies if desired.

Data Security

We take reasonable administrative, technical, and organizational measures to protect personal information against unauthorized access, disclosure, or misuse. However, no method of transmission over the internet is entirely secure.

Jurisdictional Considerations

SBW Consulting operates across multiple jurisdictions, including the United States and Puerto Rico. By using this website or submitting information, you consent to the collection and use of information in accordance with this Privacy Policy.

Your Choices

You may request to:

- Review, update, or correct your personal information
- Request removal from communications
- Inquire about how your information is used

Requests can be submitted by contacting us directly.

No Legal, Tax, or Investment Advice

Information collected or shared through this website does not create an advisory, legal, tax, or fiduciary relationship. SBW Consulting does not provide legal, tax, investment management, or insurance advice.

Policy Updates

We may update this Privacy Policy periodically. Any changes will be posted on this page with a revised effective date.

Contact

For privacy-related inquiries, please contact:

SBW Consulting

info@sbwconsulting.com