



Privacy Policy

Respect for private
information.

Privacy Policies and Practices Protect client information.

Physical, electronic, and procedural safeguards have been implemented. Personal information is never sold or traded.

Personal information may include and is not limited to questionnaires, applications, account opening documents, forms you complete, data about your transactions, and from various outside vendors and sources such as consumer reporting agencies.

Personal information, including non-public, may be utilized to offer services and to serve client relationships. Examples include providing information to W&M employees and affiliates, regulators, and to third party service providers such as custodians and broker/dealers, advisors, and consultants.

Other disclosures may be required by law, authorized by you, or made in the reasonable conduct of our business.