



ORGEL

# Privacy Notice

At Orgel Wealth Management, LLC, we understand and appreciate your concerns about the confidentiality and security of information we obtain from you, and are committed to keeping nonpublic personal information about you secure and confidential. This Privacy Notice is intended to help you understand how we fulfill this commitment.

## INFORMATION WE MAY COLLECT

From time to time, we may collect a variety of personal information about you. This information may include your Social Security number, income, account balances and transaction history, investment experience, and other relevant information. We will collect your nonpublic personal information, for example, when you:

- Open an account or make deposits or withdrawals from your accounts
- Enter into an advisory agreement
- Seek advice about your investments
- Tell us about your investment or retirement portfolio or earnings

We may also collect your personal information from others, such as other companies.

## INFORMATION WE MAY DISCLOSE

We do not disclose your nonpublic personal information, except as permitted or required by applicable law or regulation. For example, we may share this information with others for everyday business purposes such as to process your transactions, maintain or service your account, respond to court orders and legal investigations, or comply with an inquiry by a government agency or regulator. We have no affiliates and we do not share your personal information with non-affiliates for their marketing purposes. No mobile information will be shared with non-affiliates for marketing or promotional purposes. All other categories exclude text messaging originator opt-in data and consent; this information will not be shared with any non-affiliates.

## HOW WE PROTECT YOUR INFORMATION

The security of your account information is important to us. We maintain physical, electronic, and procedural safeguards reasonably designed to protect and maintain confidentiality of your nonpublic personal information, and we restrict access to this information. We will continue to adhere to our privacy policies and practices with respect to your nonpublic personal information even if your account is closed or becomes inactive.

## HOW TO CONTACT US

You may contact Orgel Wealth Management at 715-835-6525 or by mail at 2420 Rivers Edge Drive, Altoona, WI 54720.