

Privacy

Financial Companies have options with respect to how they share personal information about their clients. Respecting and protecting individual client privacy is vital to our business. Federal law gives consumers the right to limit some but not necessarily all sharing of information. Federal law also requires us to tell you how we collect, share and protect your personal information. Please read this notice carefully to understand what we do.

Protecting the Confidentiality of Client Information

We take our responsibility to protect the privacy and confidentiality of client information very seriously. We maintain physical, electronic and procedural safeguards to store and securely protect your information from unauthorized access, alteration or destruction. The only employees who are authorized to access your personal and financial information are those who need to have it to provide products or services to you.

Who is covered by the Privacy Policy

This Privacy Policy applies to all individuals and/or legal entities who are clients or former clients of Summit Wealth Partners, LLC.

Information We Have Collected About You

We limit the collection, use and retention of client information to what we consider necessary for us to honor our service obligations to you and to comply with our legal obligations as an SEC Registered Investment Adviser. The exact personal information we collect depends on the products or services we are delivering to you. This information can include your Social Security identification, financial information, your transactions with us such as custody account valuations and the related transaction history and communications with you such as personal meetings and phone calls.

Information We Share with Others

We will share your personal and financial information only as required for our normal business purposes such as to process your transactions, maintain your accounts, respond to court orders and other similar legal matters.