Triangle Wealth Management Privacy Policy

Updated February 2022

Triangle Wealth Management, Inc. ("Triangle") considers the privacy of its clients to be of fundamental importance. We want you to understand what information we collect and how we use it. Thus, we have established a policy to maintain the confidentiality of the information you share with us.

In providing financial advisory services, Triangle collects certain nonpublic information about you. Our policy is designed to keep this information confidential and strictly safeguarded, and to use or disclose it only as needed to provide services to you and your family, or as permitted or required by law. This policy is applicable to information for both current and former clients.

What information do we collect?

The purpose of collecting nonpublic information about you is to allow Triangle to effectively address your financial needs and to deliver all required communications to you. Generally, this includes your name, address, social security number, date of birth, account numbers, and information about your employment history and income. We may also have access to information that you provide to us on applications or other forms or documents such as financial statements, statements of accounts, wills, trusts, and mortgages.

Where do we get this information?

We may collect nonpublic personal information about you from multiple sources, including:

- Information we receive from you on applications or other forms
- Information about your transactions with us, our affiliates, or others, such as the custodian(s) of your account(s)
- Information we receive from non-affiliated third parties
- Information you provide directly to us as your financial partner

What information do we disclose and to whom do we disclose it?

Triangle does not disclose any nonpublic information about you without your express consent, except as permitted by law and as needed to provide the services you have requested from us. This applies to current as well as former clients. We may disclose your information to third parties as permitted by law, including the custodians or other companies used to provide services to you, to persons assessing our compliance with industry standards, or to our attorneys, accountants, and auditors as needed. From time to time, we may be required to give information about our business to regulatory authorities.

Who has access to nonpublic information?

We recognize the need to prevent unauthorized access to the information we collect, including information held in electronic format. Triangle restricts access to nonpublic personal information to those individuals who need to know to provide products or services to you and perform their respective responsibilities.

What if I am no longer a client of Triangle Wealth Management?

If you decide to close your account(s) or no longer be a client of Triangle, our Privacy Policy will continue to apply to you, which may be amended from time to time.

How is information safeguarded?

Triangle maintains physical, electronic, and procedural safeguards to protect your nonpublic personal information. We believe our procedures are reasonably designed to protect the security and confidentiality of your information. These include nondisclosure agreements with companies we hire to help us provide services to you, password-protected user access to our network and computer files, training of employees, and strict confidentiality policies that apply to all employees.

If you have any questions after reading this Privacy Policy, please contact us at 919.838.3221.