

Privacy Policy for P3 Wealth Management

Effective Date: 01/01/2025

P3 Wealth Management ("we," "us," or "our") is committed to protecting your privacy and ensuring the security of your personal information. This Privacy Policy outlines how we collect, use, share, and protect your information when you interact with our website and services.

1. Information We Collect

We may collect the following types of information:

a. Personal Information:

- Name
- Contact details (email address, phone number, mailing address)
- Financial information necessary for providing our services

b. Non-Personal Information:

- Browser type and version
- Device information
- IP address
- Pages visited on our website
- Date and time of access

c. Cookies and Tracking Technologies: We use cookies and similar technologies to enhance your browsing experience, analyze website traffic, and personalize content. You can manage your cookie preferences through your browser settings.

2. How We Use Your Information

We use the information collected for the following purposes:

- To provide financial planning and wealth management services

- To communicate with you regarding our services
 - To comply with legal and regulatory obligations
 - To improve our website and services
 - To personalize your user experience
 - For marketing purposes, with your consent
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3. How We Share Your Information

We do not sell your personal information. However, we may share your information in the following circumstances:

- **With Service Providers:** Third-party vendors who assist us in operating our website and providing our services (e.g., IT services, payment processors).
 - **For Legal Requirements:** When required by law or to protect our legal rights.
 - **With Your Consent:** If you authorize us to share your information with third parties.
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4. How We Protect Your Information

We implement industry-standard security measures to protect your information from unauthorized access, alteration, disclosure, or destruction. These measures include encryption, secure servers, and regular security assessments. However, no method of transmission over the internet or electronic storage is completely secure, and we cannot guarantee absolute security.

5. Your Rights

Depending on your jurisdiction, you may have the following rights regarding your personal information:

- Access to your information
- Correction of inaccurate or incomplete information
- Deletion of your information
- Restriction of processing

- Data portability
- Opt-out of marketing communications

To exercise these rights, please contact us at [Insert Contact Email].

6. Third-Party Links

Our website may contain links to third-party websites. We are not responsible for the privacy practices or content of these websites. We encourage you to review the privacy policies of any third-party sites you visit.

7. Children's Privacy

Our services are not directed to individuals under 18. We do not knowingly collect personal information from children. If you believe we have inadvertently collected such information, please contact us immediately.

8. Changes to This Privacy Policy

We may update this Privacy Policy from time to time. Any changes will be posted on this page with an updated "Effective Date." We encourage you to review this policy periodically.

9. Contact Us

If you have any questions or concerns about this Privacy Policy or our data practices, please contact us at:

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