Privacy Policy

Pugh Wealth Management, LLC is committed to client confidentiality and the protection of your privacy. The following information is provided, as required by law, to help you understand our privacy policy and how we will handle and maintain confidential personal information as we fulfill our obligations to protect your privacy. "Personal information" refers to the nonpublic financial information obtained by Pugh Wealth Management, LLC in connection with carrying out our services.

Information We Collect
Pugh Wealth Management, LLC collects personal information as part of our relationship to you, to provide client services and fulfill legal and regulatory requirements. The type of information Pugh Wealth Management, LLC collects may include:

- Information Pugh Wealth Management, LLC receives from you on forms (such as name, address, Social Security number, profile documents, assets and income);

- Information you provide Pugh Wealth Management, LLC directly about your personal finances or personal circumstances or which Pugh Wealth Management, LLC may receive from brokerage statements or other information you authorize Pugh Wealth Management, LLC to receive.

Information Disclosed In Administering Products and Services
Pugh Wealth Management, LLC will not disclose personal information about current or former clients to non-affiliated third parties except as permitted or required by law. Pugh Wealth Management, LLC does not sell any personal information about you to any third-party. Pugh Wealth Management, LLC will not disclose personal information without your authorization, except as required or permitted by law.

Procedures to Protect Confidentiality and Security of Your Personal Information
Pugh Wealth Management, LLC has procedures in place that limit access to personal information to those employees who need to know such information in order to perform business services. In addition, Pugh Wealth Management, LLC maintains physical, electronic and procedural safeguards to guard your nonpublic personal information.

Pugh Wealth Management, LLC will update its policy and procedures when necessary to ensure that your privacy is maintained and that Pugh Wealth Management, LLC conducts business in a way that fulfills our commitment to you. If Pugh Wealth Management, LLC makes any material changes in its privacy policy, we will make that information available to clients through our Web site and/or other communications.