



**GRAMERCY PARK**  
WEALTH ADVISORS, LLC.

## **Privacy Policy**

### **Gramercy Park Wealth Advisors, LLC**

Gramercy Park Wealth Advisors, LLC (“GPWA”) is committed to safeguarding the confidentiality, integrity and security of the non-public personal information that is entrusted to us. The categories of nonpublic information that GPWA collects from you may include information about your personal finances, information about your health to the extent that it is needed for the financial planning process, information about transactions between you and third parties, and information from consumer reporting agencies, such as credit reports.

GPWA uses this information to help you meet your personal financial goals. GPWA will not provide your personal information to mailing list vendors or solicitors. Federal and state regulators may review our company records and your personal records as permitted under law.

In order to perform administrative services, transactions, or account changes that you direct or your representative directs, it may be necessary to provide identifying information to companies, individuals, or groups that are not affiliated with GPWA. Examples of this would be transferring assets from one financial institution to another, or tax preparation. In both cases we will need to provide certain information about you to those companies and/or software providers to complete the transaction.

In certain instances, we may contract non-affiliated companies to perform services for us. Where necessary, we will disclose information about you to these third parties. In all such cases, we provide the third party with only the information necessary to carry out its assigned responsibilities and only for that purpose. We will require these third parties to treat your private information with the same high degree of confidentiality that we do.

GPWA stores your information electronically in a secure format to insure that it is not placed at unreasonable risk.

As required by law, your information will be retained during the time that you are a client, and for the required time that such records must be retained in accordance with federal and state securities laws. If you decide at some point to become an inactive client, we will continue to adhere to our privacy policies and practices with respect to your information.

GPWA may, from time to time, disclose limited information to attorneys, accountants, or other financial professionals solely for the purpose of obtaining a second opinion or to gain assistance in reviewing a specific financial question regarding your situation.

GPWA will notify you if our privacy policy is expected to materially change.

GPWA is required to deliver this Privacy Policy Statement to clients annually in writing.

If you have any questions about this Privacy Policy or to update your information with us, please contact us at [brian@gpwealthadvisors.com](mailto:brian@gpwealthadvisors.com), or by calling 615-269-5550.

