

Privacy Policy

MOUNTAIN VIEW WEALTH MANAGEMENT LLC

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PRIVACY POLICY

Clients of Mountain View Wealth Management (MVWM) share both personal and financial information. Privacy is important to us, and we are dedicated to safeguarding your information. Investment advisers are required by law to inform their clients of their policies regarding privacy of client information. We are bound by professional standards of confidentiality that are even more stringent than those required by law. Federal law gives the customer the right to limit some but not all sharing of personal information. It also requires us to tell you how we collect, share, and protect your personal information.

TYPES OF NONPUBLIC PERSONAL INFORMATION (NPI) WE COLLECT

In the normal course of business, MVWM typically obtains the following information about clients: Personal identity information such as name, address, and social security number; Information regarding securities transactions; and Financial information such as net-worth, assets, income, bank account information, and account balances.

HOW MVWM MANAGES AND PRESERVES PERSONAL INFORMATION

We do not sell information about current or former clients to 3rd parties. It is not a practice of MVWM to disclose such information to 3rd parties unless requested to do so by a client, client representative, or if necessary, in order to process a transaction, service an account, or manner permitted by law. In addition, MVWM may share information with outside companies contracted to perform administrative services. MVWM's contractual arrangements with service providers require them to treat your information as confidential. In order to preserve your personal information, MVWM maintains physical, electronic, and procedural safeguards. Our Privacy Policy restricts the use of client information and requires that it be held in strict confidence.

CLIENT NOTIFICATIONS

We are required by law to annually provide a notice describing our privacy policy. In addition, we will inform you promptly if there are changes to our policy. Please do not hesitate to contact us with questions about this notice formal agreement between non-affiliated financial companies that together market financial products or services to you.

Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.