



## Privacy Policy

1078 Commerce Parkway  
Ashland, Ohio 44805  
419-496-0016

An important part of the relationship we have with our Clients is the information you share with us. Lighthouse Wealth Management, Inc. is committed to your privacy. We do not and will not sell your personal information to anyone, for any reason.

At Lighthouse Wealth Management, Inc. we are committed to protecting the privacy of information we maintain about you. Below are details about our commitment, including the types of information we collect, how we use that information, and how we protect your information.

This privacy Notice applies to customers and other consumers with whom we have a relationship. In providing investment management and financial services to you, we collect certain nonpublic information about you. Our policy is to keep this information confidential and strictly safeguarded, and to use or disclose it only as needed to provide services to you, or as permitted by law. Protecting your privacy is of utmost importance to us.

### **Types of Information We Collect**

We collect nonpublic personal information about you in order to help provide investment advisory or tax services to you. This may include your social security number, name, address, phone number, investment objectives and experience, financial circumstances, employment, account balances and transactions and other personal information.

### **How Information is Used**

We use information about you to provide our asset management services to you, such as managing your investment account. We may disclose this information to third parties as permitted by law, including the outside broker-dealers, custodians, administrators, transfer agents, or attorneys that we need to use to provide our services to you. From time to time, we must give information about our business to regulatory authorities. This may include personal information about you.

### **Safeguarding Personal Information**

We take precautions to ensure the information we collect about you is protected, and is accessed only by authorized individuals who are trained regarding our privacy and information safeguarding practices. These include password-protected user access to our computer files and strict confidentiality policies that apply to all Lighthouse Wealth Management Inc. personnel.