

WCG Wealth Advisors, LLC

Privacy Policy

Facts	What Does the Firm Do With Your Personal Information?
Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	<p>The types of personal information we collect can include:</p> <ul style="list-style-type: none"> • Social Security number • Investment experience • Income • Account transactions • Assets • Retirement assets <p>When you are no longer our customer, we will continue to hold your information and share it as described in this notice.</p>
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information, the reasons the firm chooses to share personal information and whether you can limit this sharing.

Reason We Share Your Personal Information	Does the firm share?	Can you limit this sharing?
For our everyday business purposes, to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus. With broker-dealer firms having regulatory requirements to supervise certain of WCG's activities.	Yes	No
For our marketing purposes to offer our products and services to you	No	We don't share
For joint marketing with other financial companies	No	We don't share
For our affiliates' everyday business purposes – information about your transactions and experiences	No	We don't share
For our affiliates' everyday business purposes – information about your creditworthiness	No	We don't share
For non-affiliates to market to you <small>*if your advisor leaves WCG for another firm, WCG or your advisor may disclose your personal information to the new firm or to a third-party vendor to facilitate the transition to the new firm unless you instruct us not to disclose by contacting compliance@wealthcg.com to opt-out.</small>	Yes*	Yes

Questions?	compliance@wealthcg.com or (702) 263-1919
Who is Providing this Notice:	WCG Wealth Advisors, LLC

Definitions

How does the firm protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does the firm collect my personal information?	We collect your personal information, for example, when you: <ul style="list-style-type: none"> • Open an account • Enter into an investment advisory account • Apply for insurance • Tell us about your investment or retirement portfolio • Seek advice about your investments We also collect your personal information from others such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only: <ul style="list-style-type: none"> • Sharing for affiliates' everyday business purposes • Information about your creditworthiness • Affiliates from using your information to market to you • Sharing for non-affiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. WCG has one affiliated entity WCG Insurance, LLC. <ul style="list-style-type: none"> • We do not share with affiliates so they can market to you.
Non-affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <p>Our Non-affiliated partners include categories of companies such as financial institutions, or broker-dealers that have regulatory requirements to supervise.</p>

Joint Marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- We do not jointly market.

Other Important Information

If the mailing address provided for your account is in California, Vermont, or North Dakota, we will automatically treat your account as if you do not want us to disclose your personal information to non-affiliated third parties for purposes of them marketing to you, except as permitted by the applicable state law. If you want to consent to share your personal information with a new firm, then you must provide written consent (opt-in) before we will allow your financial professional to take your personal information to a new firm. Please contact us at compliance@wealthcg.com to opt-in or withdraw your previous opt-out.

If you want to opt-out to not disclosing your personal information to non-affiliated third parties for purposes of them marketing to you when your advisor joins a new firm, you may contact us at compliance@wealthcg.com.