Your Privacy Is Important to Us

Generational Wealth Advisors is committed to maintaining the confidentiality, integrity and security of your personal information. We trust that our Privacy Policy will assure you of our commitment to keep your personal information confidential and secure.

Information We Have About You

We collect nonpublic personal information about you from the following sources:
you, from our Investment Advisory Agreement and other forms
your Financial Advisor and Customer Service Representatives
your broker-dealer or custodian about your transactions with us or with others.

Use and Protection of Information

We use the information acquired solely for the purpose of providing investment advisory services to you. We take reasonable steps to keep confidential the information acquired. We restrict access to nonpublic personal information about you to those employees with a legitimate business need for the information. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic personal information.

Disclosure of Nonpublic Personal Information

Generational Wealth Advisors does not disclose personal information about its clients or former clients to anyone, except for servicing and processing transactions, and as permitted by law.

Privacy is Not For Sale

We do not and will not sell your personal information to anyone, for any reason, at any time.

Policy Changes

This policy may change from time to time as necessary or required by law. We will not reduce your rights under this agreement. In the event the changes are significant in nature, we will provide notification to our clients individually.

Should you have any questions regarding the above, please contact:

compliance@genwealth.net