

LURIE DAVIS WEALTH MANAGEMENT LLC

*INVESTMENTS*FINANCIAL PLANNING*BUSINESS CONSULTATION

40A BALTIMORE STREET, LYNN, MA 01902, (781-595-0396), EMAIL: ldwm@comcast.net

LDWM LLC PRIVACY STATEMENT

FACTS

WHAT DOES LDWM LLC 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?

The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- *Social Security number and income
- *account balances and transaction history
- *asset and risk tolerance

When you are no longer our customer, we continue to share your information as described in this notice.

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 LDWM LLC chooses to share; and whether you can limit this sharing.

REASONS WE CAN SHARE YOUR PERSONAL INFORMATION

DOES LDWM LLC SHARE?

CAN YOU LIMIT THIS SHARING?

For our everyday business purposes -
As permitted by law

YES

NO

For our marketing purposes - to offer our
Products and services to you

NO

We do not share

For joint marketing with other financial
Companies

NO

We do not share

For our affiliates' everyday business purposes -
Information about your transactions and
Experiences

NO

We do not share

For our affiliates' everyday business purposes -
Information about your creditworthiness

NO

We do not share

For non-affiliates to market to you

NO

We do not share

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WHO WE ARE

Who is providing this Notice?

Lurie Davis Wealth Management LLC, (“LDWM LLC”)

WHAT WE DO

How does LDWM LLC protect My personal information?

We collect your personal information, for example, when you:

- *seek advice about your investments
- *enter into an investment advisory contract
- *tell us about your investment or retirement portfolio
- *tell us about your investment or retirement earnings
- *give us your contact information

We also collect your personal information from other companies

Why can't I limit all sharing?

Federal law gives you the right to limit only:

- *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.

DEFINITIONS

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- *LDWM LLC is affiliated with Tammy Kaiser

Non-affiliates

Companies not related by common ownership or control. They can be financial and non-financial companies.

- *LDWM LLC share with Mutual Funds Companies and Tammy Kaiser

Joint Marketing

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

- *LDWM LLC, NONE