



Privacy Policy

Orca Wealth Management, LLC (hereafter referred to as "Orca Wealth Management") is committed to client confidentiality and the protection of your privacy. The following information is provided, as required by law, to help you understand our privacy policy and how we will handle and maintain confidential personal information as we fulfill our obligations to protect your privacy. "Personal information" refers to the nonpublic financial information obtained by Orca Wealth Management in connection with carrying out our services.

Information We Collect

Orca Wealth Management collects personal information as part of our relationship with you in order to provide client services and fulfill legal and regulatory requirements. The type of information Orca Wealth Management collects may include:

- Information Orca Wealth Management receives from you on forms (such as your name, address, Social Security number, profile documents, assets, and income);
- Information you provide Orca Wealth Management directly about your personal finances or personal circumstances or which Orca Wealth Management may receive from brokerage statements or other information you authorize Orca Wealth Management to receive.

Information Disclosed in Administering Products and Services

Orca Wealth Management shares your personal information for everyday business purposes, including to process transactions, maintain your account, respond to court orders or legal investigations or report to credit bureaus as well as for our marketing purposes. Orca Wealth Management does not sell any personal information about you to any third party. Other than to service your account, Orca Wealth Management will not disclose personal information to non-affiliated third parties without your authorization, except as required or permitted by law.

Procedures to Protect Confidentiality and Security of Your Personal Information

Orca Wealth Management has procedures in place that limit access to personal information to those employees who need to know such information in order to perform business services. To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. In addition, Orca Wealth Management maintains physical, electronic, and procedural safeguards to guard your nonpublic personal information.

Orca Wealth Management will update its policy and procedures when necessary to ensure that your privacy is maintained and that Orca Wealth Management conducts business in a way that fulfills our commitment to you. If Orca Wealth Management makes any material changes in its privacy policy, we will provide you notice of any material change to this policy.

If you have questions, please contact us (727) 938-1600.