

FACTS

WHAT DOES ARCADIA WEALTH MANAGEMENT INC. (“ARCADIA”) 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: <ul style="list-style-type: none"> ▪ Social security number ▪ Account balances ▪ Account Transactions ▪ Income ▪ Assets ▪ Risk tolerance 	
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 Arcadia chooses to share; and whether you can limit this sharing. Arcadia Wealth Management will deliver this policy annually or upon any material change.	
Reasons we can share your personal information	Does Arcadia Share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your accounts(s) or respond to court orders and legal investigations.	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	No	We don’t share
Questions?	Call Allison Vanaski at (631) 549-5400	

Who we are	
Who is providing this notice?	Arcadia Wealth Management, Inc.
What we do	
How does Arcadia 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.
How does Arcadia collect my personal information?	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> ▪ Provide account information or give us your contact information ▪ Open an account ▪ Seek financial or tax advice or seek advice about your investments ▪ Direct us to buy or sell your securities ▪ Enter into an investment advisory contract ▪ Tell us about your investment or retirement portfolio or investment or retirement earnings
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only</p> <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
Definitions	
Affiliates	<ul style="list-style-type: none"> ▪ Arcadia has no affiliates
Non-affiliates	<ul style="list-style-type: none"> ▪ Arcadia does not share with non-affiliates so they can market to you.
Joint Marketing	<ul style="list-style-type: none"> ▪ Arcadia does not jointly market.