



POLARIS WEALTH ADVISORY GROUP, LLC

PRIVACY NOTICE

MARCH 2023

FACTS	Information about the personal information you provide to Polaris Wealth Advisory Group, LLC (“PWAG”).
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WHY?	Financial services 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.
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WHAT?	<p>The types of personal information we collect and share depends on the product or service you have with us. The information can include:</p> <ul style="list-style-type: none"> Social Security Number and date of birth Net worth, income, and payment history Credit history, credit scores, and tax history
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HOW?	All financial services companies need to share their clients’ personal information in order to run their everyday business. In the section below, we list the reasons financial services companies can share our clients’ personal information; the reasons PWAG chooses to share; and whether you can limit this sharing.
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Reasons we can share your personal information	Does PWAG share?	Can you limit sharing?
For our everyday business purposes – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes – to offer our products and services to you	Yes	Yes
For joint marketing with other financial services companies (including our affiliates or other 3rd party firms) – to offer products and services to you	Yes	Yes
For our affiliates’ everyday business purposes – such as information about your transactions, experiences, taxes, and creditworthiness	Yes	Yes

TO LIMIT OUR SHARING	<ol style="list-style-type: none"> 1. Call your Advisor at 415-263-5600 2. Send the completed form below by email to privacy@polariswealth.com <p><i>Please note:</i> If you are a new client, we can begin sharing your information 30 days from the date we’ve provided this notice. When you are no longer a client, we continue to share your information as described in this document unless you choose to limit our sharing. You may contact us at any time to limit our sharing.</p>
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WHO WE ARE	
Who is providing this notice	Polaris Wealth Advisory Group, LLC (“PWAG”)
WHAT WE DO	
How does PWAG 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 and systems safeguards, secured file storage, and secure office space.
How does PWAG collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> Engage PWAG to assist with your financial planning and/or management of your assets Through our onboarding protocols under which we are required to “Know Your Customer” When you register on our website
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 taxes or creditworthiness Affiliates from using your personal information to market to you Sharing for non-affiliates to market to you
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone in your household – unless you tell us otherwise

QUESTIONS?	Call your Wealth Advisor at 415-263-5600 or go to www.polariswealth.com
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MAIL IN FORM TO LIMIT SHARING		
<p>If you have a household account, your choice(s) will apply to everyone in your household unless you mark below.</p> <p><input type="checkbox"/> Apply my choices only to me</p>	<p>Mark any/all you want to limit:</p> <p><input type="checkbox"/> Do not use my personal information to market any products and services to me.</p> <p><input type="checkbox"/> Do not allow your affiliates to use my personal information to market any products and services to me.</p> <p><input type="checkbox"/> Do not share my personal information with non-affiliates to market their products and services to me.</p> <p><input type="checkbox"/> Do not share information about my creditworthiness with your affiliates for the everyday business purposes.</p>	
	NAME	MAIL TO:
	STREET	Polaris Wealth Advisory
	CITY, STATE	85 Wells Avenue
	ZIP	Newton, MA 02459
	ACCOUNT #(s)	Attn: Pete Galloway, CCO
	EMAIL TO:	
	privacy@polariswealth.com	