Blue Anchor Wealth Advisors Privacy Policy

At Blue Anchor Wealth Advisors, an independent Registered Investment Advisor, we consider client privacy to be a fundamental aspect of our client relationships. We are committed to maintaining the confidentiality, integrity, and security of our current, prospective and former clients' personal information.

If you find any errors in your personal information, or if you need to make updates to your personal information, you can do so by notifying us or accessing your account online at www.charlesschwab.com.

Blue Anchor
WEALTH ADVISORS, LLC

Our Privacy Policy is your assurance that we pledge to respect and protect the privacy of your account(s) under our management and to protect the security and the confidentiality of the information that you provide to us.

In the course of providing you with Financial Planning and Advisory services, we will ask for personal information. We may collect, retain, and use client information for the purpose of meeting the suitability rules for investment advice that we render to you as part of our services and for the purpose of administering our operations. This personal information gathered allows us to provide client services and to comply with legal and regulatory requirements. The advice and recommendations that we make are directly related to the personal and financial information that we gather from you, and from financial documents such as income tax returns, investment statements, retirement plan documents and other written, electronic or verbal correspondence from you, your attorney, accountant or other trusted source.

We do not sell, rent, exchange or disclose your information with outside organizations unless the third party is essential in administering our operations or except as required by law.

The phone numbers we collect and the consent we receive for SMS text messaging will not be shared with 3rd-party providers.

We will only disclose personal information about you, your family, your business and your finances to companies that help us process transactions for your investment goals, investment accounts, financial plans, retirement plans, taxes and other financial matters. This would typically be done from sources such as account applications, distribution requests, linking account requests or other requests made by you to facilitate your financial goals.

None of the companies that we work with have been given any authorization to use any of your personal information for their own purposes, and furthermore, these companies are all required to maintain the confidentiality of the information provided to them.

We will only disclose personal information where we, in good faith, believe that it is required under law, to cooperate with regulators, the IRS, or law enforcement authorities.

Blue Anchor Wealth Advisors follows strict procedural and technical safeguards to protect your personal information from unauthorized access such as password protected systems, updated anti-virus and anti-spyware software, and encrypted hardware and software firewalls.

We will continue to monitor and evaluate our efforts to protect your privacy and the confidentiality of your personal and financial information at all times.