Rhame & Gorrell Wealth Management

Privacy Policy

FACTS	WHAT DOES RHAME & GORRELL WEALTH MANAGEMENT, LLC DO WITH YOUR FINANCIAL 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 depends on the product or service you have with us. This information can include: • Social Security number and income • Account balances and assets • Transaction history
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 Rhame & Gorrell Wealth Management, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Rhame & Gorrell Wealth Management, LLC share?	Can you limit this 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	No
For joint marketing with other financial companies	No	Not Applicable
For our affiliates' everyday business purposes – information about your transactions and experiences	No	Not Applicable
For our affiliates' everyday business purposes – information about your creditworthiness	No	Not Applicable
For our affiliates to market to you	No	Not Applicable
For nonaffiliates to market to you	No	Not Applicable

To limit our sharing	Call (832) 789-1100 **Please note:** If you are a *new* customer, we can begin sharing your information [30] days from the date we sent this notice. When you are *no longer* our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.
Questions?	Call (832) 789-1100

Who we are	
Who is providing this notice?	Rhame & Gorrell Wealth Management, LLC

What we do	
How does Rhame & Gorrell Wealth Management, LLC 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 and building.
How does Rhame & Gorrell Wealth Management, LLC collect my personal information?	We collect your personal information, for example, when you: • Open an account • Deposit money • Seek advice about your investments • Enter into an investment advisory contract • Tell us about your investment or retirement portfolio or earnings 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 nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.

Definitions	
Affiliates	Companies related by common ownership and control. They can be financial and nonfinancial companies. • *We have no affiliates.*
Nonaffiliates	Companies not related by common ownership and control. They can be financial or nonfinancial companies. • *We do not share with nonaffiliates so that they can market to you.*
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or service to you. • *We do not jointly market.*