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Romano Wealth Management

Privacy Policy

It is the policy of Romano Wealth Management to keep all personal information confidential. This information includes account profile and financial information provided by you when your account was opened and through updates that you provide to us. This information is used by us and First Clearing to provide you with the financial services and products necessary for your account. It is our policy to not provide this information to third parties, except as required by law enforcement organizations, or as permitted by you. This information may be shared with entities such as auditors and transfer agents that help distribute investor materials. We restrict access of nonpublic personal information to those employees who need to know this information to provide the best level of service to you. We also maintain physical, electronic, and procedural safeguards to protect your nonpublic personal information. Rest assured that the safekeeping of your privacy is of the utmost importance to us. You are welcome to contact your Portfolio Manager at (847) 866-7700 with any questions regarding the Privacy Policy.

We reserve the right to revise our Privacy Policy, but we will not do so without notice to you.