

## **PRIVACY DISCLOSURE DOCUMENT**

Independent Financial Partners (“IFP”), doing business as Delancey Wealth Management, LLC, has as a primary client goal protecting your privacy.

To conduct regular business, we may collect nonpublic personal information from sources such as:

- Account applications and other standard forms related to your accounts. Examples of information collected include your name, address, Social Security number, assets, types and amounts of investments, transactions and income.
- Your transactions with IFP and its affiliated vendors, including those that work closely with IFP to provide you with diverse financial products and services. Examples of information collected include your account balance, payment history, parties to transactions, types and amounts of investments, transactions, and credit card usage.
- Consumer reporting agencies, including information concerning your credit worthiness and credit history.
- Information obtained from third parties when verifying applications or other forms. This may be obtained from your current or past employers or from other institutions with which you conduct financial transactions.

Keeping your information secure is one of our most important responsibilities. We restrict access to your personal information to those employees and agents who assist us in providing products or services to you. We maintain physical, electronic and procedural safeguards that comply with applicable law to protect your personal information. We train our employees in the proper handling of personal information. When we use other companies to help provide our services to you, we require them to protect the confidentiality of personal information they receive.

### **Disclosing Personal Information to Non-Affiliated Third Parties**

We do not sell, share or disclose your personal information to non-affiliated third-party marketing companies, except personal information we share with other financial institutions pursuant to joint marketing agreements we enter into with them.

We may disclose all of the information we collect, as described above in the section captioned “How We Collect Your Personal Information,” to companies that perform marketing or other services on our behalf and to other financial institutions with which we have joint marketing agreements. All of these companies are contractually obligated to keep the information that we provide confidential and use the information only to provide the services as allowed by applicable law or regulation. They are not permitted to share or use the information for any other purpose. We may also disclose all of the information we collect to our affiliates, as described above in the section captioned “How

We Collect Your Personal Information.” To the extent that applicable state laws grant you greater protections in connection with our sharing of your personal information, we will comply with those laws.

We may also disclose your personal information as permitted or required by law. These disclosures may include, for example, information to process transactions on your behalf, to conduct our operations, to follow your instructions as you authorize, or to protect the security of your financial records.

#### **For Clients of Independent Advisors**

If your financial advisor terminates his or her relationship with us and moves to another brokerage or investment advisory firm (“New Firm”), we or your financial advisor may disclose your personal information to the New Firm, unless you instruct us not to. If you do not want us or your financial advisor to disclose your personal information to the New Firm, and if you do not want your financial advisor to retain copies of your personal information when your financial advisor terminates his or her relationship with us, you may request that we and/or your financial advisor limit the information that is shared with the New Firm by notifying us in writing at: Independent Financial Partners, 3030 N. Rocky Point Drive West, Suite 150, Tampa, FL 33607.

#### **If Your Relationship With Us Ends**

If your relationship with us ends, we will continue to treat and protect your personal information in accordance with this Privacy Notice. That means that we may continue to share your personal information with our lending partners and affiliates as described above or permitted by law. However, if you notify us of your election not to have us share your personal information with others before or after your relationship with us ends, we will honor that request.

#### **Changes to Our Privacy Policy Notices**

We reserve the right to amend (that is, to add to, delete from, or change) the terms of this Privacy Notice from time to time. Our Privacy Notice, as in effect from time to time, is continually posted on our website. By electing to become one of our customers or by receiving our products and related services, you agree to receive copies of our Privacy Notice and any amendments to it from our website, unless you notify us otherwise in writing at the address provided above. You may view our Privacy Notice online at [www.ifpartners.com](http://www.ifpartners.com) (click on Privacy/Security).