



Privacy Policy

The following information is provided by Baldwin Wealth Management, LLC (BALDWIN), a Missouri limited liability corporation, as required by law, to help you understand our privacy policy and how we will handle and maintain confidential personal information as we fulfill our obligations to protect your privacy. “Personal information” refers to the nonpublic financial information obtained by BALDWIN in connection with carrying out our services.

Information We Collect

BALDWIN collects personal information as part of our relationship with you, to provide business services and fulfill legal and regulatory requirements. The type of information that BALDWIN collects may include:

- Information BALDWIN receives from you on forms (such as name, address, Social Security number, assets, and income)
- Information you provide BALDWIN directly about your personal finances or personal circumstances or which BALDWIN may receive from brokerage statements, custody statements, or other information you authorize BALDWIN to receive

Information Disclosed in Administering Products and Services

BALDWIN will not disclose personal information about current or former clients to non-affiliated third parties except as permitted or required by law. BALDWIN does not sell any personal information about you to any third party. BALDWIN will not disclose personal information without your authorization, except as required or permitted by law, even to affiliated third parties.

Procedures to Protect Confidentiality and Security of Your Personal Information

BALDWIN has procedures in place that limit access to personal information to those employees who need to know such information in order to perform business services. BALDWIN educates its employees on the importance of protecting the privacy and security of confidential personal information.

Customer Notification Policies

BALDWIN maintains a written incident management and response program and will notify affected customers of any unauthorized access to sensitive customer information, in accordance with applicable State or Federal regulations.

Update Policy

BALDWIN will update its policy and procedures when necessary to ensure that your privacy is maintained and that BALDWIN conducts business in a way that fulfills our commitment to you. If BALDWIN makes any material changes in its privacy policy, we will make that information available to you, our customers, through our website and/or other communications.