

DeBlanc Wealth Management LLC
443 Nottoway Walk Alexandria Va. 22304
(760) 216-3854
February 5, 2024

Privacy Policy

DeBlanc Wealth Management, LLC. values our customers and makes it a priority to safeguard the confidential information of our customers. We are committed to protecting your privacy and maintaining your trust and confidence.

DeBlanc Wealth Management, LLC. collects information about you to assist us in providing services and products to help you meet your financial goals and objectives and provide high standards of customer service. Additionally, information is obtained from you in order to help us fulfill our legal and regulatory requirements. Information collected may vary depending on the products and services requested and the scope of your engagement with us.

Information Collected About You

DeBlanc Wealth Management, LLC. collects nonpublic personal information about you from the following sources:

- Information you provide on our website, our affiliated websites, and on applications and related forms, such as name, address, telephone number, Social Security or Tax Identification number, birth date, net worth, annual income, information about your personal finances, financial information such as bank accounts, and medical information if insurance services are provided.
- Information about your transactions with us, such as account balances, payment history, account numbers, and account activity.
- Information from your employer, association, or benefit plan sponsor regarding any group products we may provide or assist in reviewing on your behalf.
- Information from consumer reporting agencies, such as credit bureau reports, credit history, credit scores and other information relating to your creditworthiness. Additionally, information may be obtained such as demographics depending on the products and services you are requesting from us.

Policies and Practices to Protect Your Personal Information

We do not disclose your nonpublic personal information to nonaffiliates, except as permitted by applicable law or regulation or to service your account, as described below. We train our staff to take caution in handling personal information. We restrict access to nonpublic information about you to staff that need to know such information, who assist in providing products and services to you, or who assist in the administration of the office, in order to maintain confidentiality of your information. We have security practices and procedures in place to ensure the confidentiality of your information in accordance with this policy.

If you close your account, cease services with us, or become an inactive customer, we will continue to adhere to the privacy policy disclosed herein, unless we notify you by providing an amended Privacy Notice.

Disclosure of Personal Information

We may disclose personal information obtained from you to financial service providers, non-financial providers, and others that service or provide support to your accounts, as permitted under law, such as:

- Securities broker/dealers.
- Custodians and transfer agents
- Other investment advisers or sub-advisers who provide services to you or your account.
- Insurance agents and insurance companies.
- Investment companies.
- Third-party administrators and vendors hired to effect, administer or enforce transactions or services in your accounts.
- Consumer reporting agencies in connection with your application or renewal of insurance coverage.

We will not share information about you with nonaffiliated third parties, unless we have provided you with an updated Privacy Notice and provided you with an opportunity to approve or disapprove of the sharing of your information.

We may share information with our affiliates, who are under common control, for everyday business purposes, marketing purposes and joint marketing purposes. We may share your eligibility information, including your demographic information and credit information, with our affiliates for marketing purposes. You have the right to opt out of or limit our sharing of information with our affiliates for marketing purposes; to do so, please notify us in writing and send it to us by mail to DeBlanc Wealth Management, LLC., 443 Nottoway Walk, Alexandria, Virginia 22304.

Additionally, we may be required by law or regulation to disclose information to third parties such as in response to a subpoena, to prevent fraud, to comply with rules and regulations to which we are subject, and in response to inquiries from industry regulators.

We will affirm our Privacy Policy annually in writing, provided you maintain an ongoing relationship with us. In addition, if we change our Privacy Policy, we will notify you by providing you with an amended Privacy Notice prior to making disclosure of your nonpublic information to nonaffiliated third parties that are not required or specifically permitted under law.