

Privacy Policy

Our Commitment to You

When you become a client you entrust us with not only your financial assets but also with personal information about you. We treat this information as confidential and recognize the importance of protecting access to it.

The Type of Information We Collect About You

In the course of doing business, we collect nonpublic information about you. You typically provide personal information when you become a client or when you request a transaction that involves us. This nonpublic information may include information regarding your name and address, social security number, assets, income, account balance, bank account information, personal tax information, and investment activity.

What We Do With Your Personal Information

We do not sell information about current or former clients to third parties, and we do not disclose it to third parties unless requested by a client or necessary to process a transaction, service an account, or as required or permitted by law or regulatory authorities with jurisdiction over us to do so. As permitted by law, we may share your information with our affiliates, Fortress Partners Capital Management, Ltd., and Foundation Financial Partners, LLC. We may share information with companies that perform administrative services for us. However, our agreements restrict those companies from using our client information for any other purpose than that for which they have been hired.

How We Safeguard Your Personal Information

To protect your personal information, we maintain physical, electronic, and procedural safeguards to guard your personal information. Our Privacy Policy, which applies to all employees, restricts the use of client information and requires that it be held in strict confidence.

We'll Keep You Informed

As required by federal law, we will send you our privacy policy annually. In addition, we will tell you promptly if we change this policy. Should you have any questions regarding our privacy policy, please contact us by phone at 262-369-1095, e-mail us at info@fortresspartners.com, or write to us at Fortress Partners Capital Management, Ltd.

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