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Privacy Policy

Your privacy is a top priority for Total Clarity Wealth Management, Inc. We take our commitment to protecting the confidentiality of your non-public personal information very seriously. Please take a moment to review this Privacy Policy. Feel free to contact us at 630-762-9352 with any questions that you may have.

Information About You That We Collect - As part of providing services to you, we collect non-public personal information about you – much of which is supplied to us directly from you. The information we collect varies depending on the products or services you request and may include:

Name, address, phone numbers, Social Security Number, birth date, assets, income, account transaction information, email address, as well as information about your accounts outside of Total Clarity, information from our affiliates and others about your transactions, and information from account forms and interviews with you.

Information We May Disclose - We have implemented security standards and processes – including physical, electronic and procedural safeguards such as employee training and confidentiality agreements – designed to protect your information. We restrict access to your non-public personal information to those employees and agents who need to know your information to perform their job responsibilities or provide services to you. Companies need to share personal customer information in order to be able to conduct daily business.

We do not sell or disclose your non-public personal information to non-affiliated third-party marketing companies. We may share your non-public information that we collect with companies engaged to work with us. These include third-party administrators and vendors hired to effect, administer or enforce a transaction that you request or authorize; broker-dealer firms having regulatory requirements to supervise certain Total Clarity activities, and companies that develop or maintain software, or perform portfolio reporting services that assist us in evaluating your financial situation, help us manage our practice or to provide reports to you.

Similarly, to help us provide products or services to you, we may share your non-public personal information with non-affiliated third parties (such as mutual fund companies, insurance companies or other product sponsors). Finally we may also disclose your non-public information to our broker/dealers and custodians. These companies are contractually obligated to keep your information confidential and use it only for the services required or as allowed by applicable law. We also may be required by law or regulation to disclose your non-public personal information to third parties - for example: in response to a subpoena, to prevent fraud, and to comply with the rules of industry regulators or in response to inquiries from them.

Other Disclosures We May Make - We recognize that your relationship with your advisory representative is important. Should your advisory representative decide to move to a registered investment adviser other than Total Clarity, your representative may take your non-public confidential information to a new firm so that he or she can continue to service your account(s) at the new firm if you wish.

Policy Relating to Former Customers - If you decide to close your account(s) with us or in the event that you become an inactive customer, our Privacy Policy will continue to apply to you.

Changes to Our Privacy Policy – We review this Privacy Policy on an annual basis and update when applicable. You are welcome to review our current policy online at: www.totalclaritywealth.com.

Advisors associated with Total Clarity Wealth Management, Inc. may be either (1) registered representatives with and securities offered through LPL Financial, Member FINRA/SIPC, and investment advisor representatives of Total Clarity Wealth Management, Inc.; or (2) solely investment advisor representatives of Total Clarity Wealth Management, Inc. and not affiliated with LPL Financial. Investment advice is offered through Total Clarity Wealth Management, Inc., a registered investment advisor and separate entity from LPL Financial.

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