



Privacy Policy and Client Consent to Release Information

Capitalwize, LLC considers the protection of personal information to be a foundation of customer trust and a sound business practice. We employ physical, electronic and procedural controls in order to protect client confidentiality. We may use personal information about you to assist us in completing your financial plan, completing transaction or account changes, and to maintain or service your account. At Capitalwize, LLC, we will always restrict access to personal information to those who require it to provide products or services to you. The only time we will provide any information about you or your financial information is with your express, written consent as required by law.

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