

Windsor Advisory Group, LLC

Privacy Policy Notice

While providing you with advisory services, we receive non-public personal information from and about you. Windsor Advisory Group, LLC (“Windsor”) is committed to keeping non-public personal information about you secure and confidential. This notice is intended to help you understand how we fulfill this commitment.

The types of non-public personal information we collect and share depend on the services we provide to you. This information can include:

- Social security number
- Name, address and, telephone number
- Income and assets
- Account transactions and balances

We do not share your non-public personal information, except as required by law or regulation or to provide our advisory services to you. We share your personal information with non-affiliated third parties, such as custodians and investment managers for everyday business purposes. We also share personal information with third parties who provide necessary technical support, legal counsel and accounting or compliance services, for example.

Our agreements with these service providers require them to protect the confidentiality of your information and to use it only to perform the services for which we hired them.

To protect your personal information from unauthorized access and use, we have implemented security measures to comply with Federal law. With respect to our internal security policies, we maintain procedural safeguards for both physical and electronic records to protect your non-public personal information, and to restrict access to this information. If you cease being our client, we continue to protect your information as described in this notice.

While Federal Law gives you the right to limit sharing with affiliates for everyday business purposes or for marketing purposes, Windsor does not have any affiliates and we do not share your information with non-affiliates to market to you.

If you have any questions about our policy, please do not hesitate to contact our Chief Compliance Officer, Stephanie Weir.

Windsor Advisory Group, LLC
2130 Quarry Trails Dr, 1st Floor
Columbus, OH 43228
614-545-0300 | sweir@wag-llc.com