

# Privacy Policy

**Effective Date:** 7/1/2025

At **Crestview Wealth Management** ("Crestview", "we", "us", or "our"), your privacy is important to us. This Privacy Policy describes how we collect, use, disclose, and safeguard your personal information when you visit our website <https://crestviewwm.com> (the "Site") and interact with us online or offline.

By using the Site, you agree to the collection and use of information in accordance with this Privacy Policy.

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## 1. Information We Collect

We may collect personal information in a variety of ways, including:

### a. Information You Provide

- Name, email address, phone number, and other contact information.
- Financial or investment-related information you choose to provide via forms or consultations.
- Any other personal data you submit voluntarily through contact forms, scheduling tools, or subscription services.

### b. Information Collected Automatically

When you visit our Site, we may automatically collect:

- IP address and browser type
- Device identifiers
- Pages viewed and usage data
- Time and date of access
- Referring website address

This data helps us understand how visitors interact with our Site and improve our content and services.

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## 2. How We Use Your Information

We may use the information we collect for purposes including:

- To respond to your inquiries or provide requested services
  - To manage client relationships
  - To send updates, newsletters, or marketing communications (with your consent)
  - To improve the functionality and performance of our Site
  - To comply with legal and regulatory obligations
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## 3. Sharing of Information

We do **not** sell or rent your personal information. We may share information with:

- Service providers who help operate our business (e.g., IT support, email delivery services)
- Legal, regulatory, or governmental authorities when required to comply with the law
- Other parties with your consent

All service providers are contractually obligated to keep your information confidential and secure.

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## 4. Data Security

We implement reasonable administrative, technical, and physical safeguards to protect your personal information. However, no method of transmission over the Internet or electronic storage is 100% secure. We cannot guarantee absolute security.

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## **5. Your Choices and Rights**

You may:

- Request access to, correction of, or deletion of your personal data
- Opt out of receiving marketing communications
- Limit certain data uses and disclosures, where applicable

To exercise any of these rights, please contact us at the information provided below.

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## **6. Cookies and Tracking Technologies**

Our Site uses cookies and similar technologies to enhance user experience. These may collect data such as pages visited, browser type, and session duration. You may disable cookies in your browser settings, but some features of the Site may not function properly.

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## **7. Third-Party Websites**

Our Site may contain links to third-party websites. We are not responsible for the privacy practices or content of such external sites. We encourage you to review the privacy policies of any website you visit.

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## **8. Children's Privacy**

Our services are not directed to individuals under the age of 18. We do not knowingly collect personal information from children. If we learn that we have collected personal data from a child without parental consent, we will delete it promptly.

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## 9. Changes to This Privacy Policy

We may update this Privacy Policy from time to time. Any changes will be posted on this page with an updated effective date. Your continued use of the Site after changes are made constitutes your acceptance of the updated policy.

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## 10. Contact Us

If you have questions about this Privacy Policy or your personal information, please contact us at:

**Crestview Wealth Management**

6540 Alliance Dr.

Ste. 120

Rockwall, TX 75032

**Phone:** (469) 552-2922

**Email:** [Info@CrestviewWM.com](mailto:Info@CrestviewWM.com)