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Privacy Policy

Total Clarity Wealth Management and its Investment Advisory Representatives believe that protecting your privacy and the confidentiality of your personal and financial information is a top priority. The privacy policy is created from a foundational principle of conducting business in an ethical manner, and assuring you of our integrity and trustworthiness. This privacy policy is designed to make you aware of the information we collect, the measures we take to safeguard it, and the situations in which we may share information with select business partners.

Collecting your Information:

We collect and maintain only the information necessary for us to best serve your financial needs, provide you with protection against fraud, or to meet the legal and regulatory requirements to which we are subject. Total Clarity collects the following information in the course of conducting regular business activities.

1) From you: We collect information you provided to us in person, on forms, by phone and online, such as: your name, address, Social Security number, your employer and your existing assets and current income;

2) From your financial transactions: We collect information from your financial transactions with Total Clarity, using current and historical account transactions and account balances.

Safeguarding your information:

We maintain physical, electronic (e.g., data encryption and password protection) and procedural safeguards to protect your nonpublic personal information in compliance with applicable laws and regulations. These safeguards are in place to ensure that access to customer information is limited to employees, registered representatives and agents who may need such information to complete their work. Total Clarity requires that employees agree to strictly maintain the confidentiality of all client information they come in contact with as a part of the normal course of conducting business.

Sharing your information:

First and foremost, we do not sell client lists, nor do we disclose client information to marketing companies. Total Clarity will share information only with your consent, except as necessary in the course of supporting your account:

1. to process or service a transaction or product as authorized or requested by you;
2. when required by law or industry regulators to disclose such information to appropriate legal and regulatory authorities;
3. as permitted by federal and state laws. We may share or exchange information 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; and those that develop or maintain software, or perform portfolio reporting services.
4. with other professionals, either upon your request, or when you've given us your prior written approval. These professionals include: accountants, estate planners, mortgage brokers, etc.

We make every effort to keep records of your information accurate. If you notice an error in Total Clarity's written materials related to your account(s), please let us know by calling the office at 630-762-9352.

You will receive a copy of this privacy policy annually in writing for as long as you are a Total Clarity client. We may modify this policy on occasion to ensure that we are in compliance with laws we must adhere to, and in order to accurately reflect current business practices.

In the event that you are no longer a client with Total Clarity Wealth Management, Inc., we will continue to maintain this privacy policy as it relates to your personal information for as long as the law requires.

*Securities and investment advisory services offered through Financial Network Investment Corporation, member SIPC.
Certain advisory services offered through Total Clarity Wealth Management, Inc. Total Clarity and Financial Network are not affiliated.*

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