

March 2021	PRIVACY POLICY – SEREN WEALTH ADVISORS, LLC	
Facts	WHAT DOES SEREN WEALTH ADVISORS, LLC DO WITH YOUR PERSONAL INFORMATION?	
Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal Law also requires us to tell you how we collect, share and protect your personal information. Please read this notice carefully to understand what we do	
What?	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> • Social Security number and financial information • Account balances and transaction history • _____ <p>When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p>	
How?	All financial companies need to share customer’s personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customer’s personal information; the reasons Seren Wealth Advisors, LLC chooses to share; and whether you can limit this sharing.	
Reasons we can share your personal information.	Do we share?	Can you limit this sharing?
For our everyday business purposes- Such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes- To offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	No
For our affiliates’ everyday business purposes- Information about your transactions and experiences, credit worthiness and to market to you	Yes	No
For our non-affiliates to market to you	No	We don’t share
To limit our sharing	Please note: If you are a <i>new</i> client, we can begin sharing your information from the date we sent this notice. When you are <i>no longer</i> our client, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.	

Who is providing this notice?	Seren Wealth Advisors, LLC
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WHAT WE DO	
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How do we protect your personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How do we collect your personal information?	We collect your personal information when you engage our services and we gather information to provide your services. We may also collect your personal information from others, such as affiliates or other companies.
Why can't you limit all sharing?	<p>Federal law gives you the right to limit only:</p> <ul style="list-style-type: none"> • Sharing for affiliates' everyday business purposes-information about your creditworthiness • Affiliates from using your information to market to you • Sharing for non-affiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing.</p>

DEFINITIONS	
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Affiliates	<p>Companies related by common ownership or control. They can be financial and non-financial companies.</p> <ul style="list-style-type: none"> • Stephanie Blakes - As Insurance Product Provider _____
Non-Affiliates	<p>Companies not related by common ownership or control. They can be financial and non-financial companies.</p> <ul style="list-style-type: none"> • Stephanie Blakes - As CREG, Real Estate Agent _____
Joint Marketing	<p>A formal agreement between non-affiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> • _____ • _____

Other important information	
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- Birthday month/date and address will be provided to The Birthday Company to send annual cards.	
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Questions?	Email: info@serenwealth.com
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