

Gerring Wealth Management LLC

PRIVACY STATEMENT

Gerring Wealth Management (GWM) is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to our firm. GWM holds all personal information in the strictest confidence. GWM uses information collected from you to develop investment strategies and financial planning solutions to help you achieve your goals. With your permission, GWM may contact and discuss selected information with non-affiliated third party associates such as lawyers, accountants, brokers, bankers and mortgage lenders. GWM requires the strictest confidence of all non-affiliated third parties that require access to your personal information. You may notify GWM in writing at any time if you would rather GWM not share information with these third parties in the development of your financial plan or investment strategy.

GWM maintains strict procedural safeguards that comply with applicable federal standards to guard your private personal information and prevent unauthorized access. GWM does not provide your personal information to mailing list vendors or solicitors.

GWM will maintain your personal records while you are a client and for the required period afterwards as mandated by federal and state securities laws. After that time, information may be destroyed or discarded.

GWM will notify you in advance of any changes in the Privacy Statement and will deliver it to you at least annually in writing.