

Privacy Policy & Information

The Facts: What J.W. Cole Does With Your Information

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 and do not do.

What?

The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security Number
- Investment Experience
- Date of Birth
- Risk Tolerance
- Income
- Account Balances & Transactions
- Assets & Investment Performance
- Tax Reporting Information
- Trading Frequency
- Net Worth
- Payment History
- Parties to Transactions

Why?

All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons J.W.C chooses to share; and whether you can limit this sharing.

Reasons your information may be shared:	Does J.W. Cole Share?	Can you limit this sharing?
For our everyday business purposes: Processing your transactions, maintaining your account(s), responding to court orders and legal investigations, or reporting to credit bureaus.	Yes	No
For our marketing purposes: In order to offer our products and services to you.	Yes	No
For joint marketing: Working with other financial companies.	No	Yes
For our affiliates' everyday business: Specifically information about your transactions and experiences	Yes	No
For our affiliates' everyday business: Specifically information about your creditworthiness	No	Yes
For non-associated companies: Marketing to you	No	Yes

If you have any questions about J.W. Cole's privacy policy, please contact us at (833) 337-0522, or go to <https://www.jw-cole.info>