PRIVACY DISCLOSURE DOCUMENT

Forteris Wealth Management
200 Business Park Drive
Armonk, NY 10504

Forteris Wealth Management's primary client goal is to protect your privacy.

To conduct regular business, we may collect non-public personal information from sources such as:

- Information reported by you on applications or other forms you provide to us; and
- Information about your transactions with us, our affiliates, or others.

As the Firm shares nonpublic information solely to service our client accounts, we do not disclose any nonpublic personal information about our clients or former clients to anyone, except as permitted by law. All information will remain confidential.

To provide the utmost in service, we may disclose the information below regarding clients and/or former clients, as necessary, to companies to perform certain services on our behalf, or as required by law.

- Information the firm receives from clients on applications (name, social security number, address, assets, etc.); and
- Information about client transactions with our firm or others (account information, payment history, parties to transactions, etc.).

Information Safeguarding

Forteris Wealth Management will internally safeguard your nonpublic personal information by restricting access to only those employees who provide products or services to you or those who need access to your information to service your account. In addition, we will maintain physical, electronic and procedural safeguards that meet federal and/or state standards to guard your nonpublic personal information.