

Legacy Wealth Management, LLC

PRIVACY POLICY

Last Updated: 06/04/2026

PLEASE READ THIS PRIVACY POLICY CAREFULLY TO UNDERSTAND HOW WE TREAT YOUR PERSONAL INFORMATION AND WHAT CHOICES AND RIGHTS YOU HAVE IN THIS REGARD. IF YOU DO NOT AGREE WITH THIS POLICY AND OUR TERMS AND CONDITIONS, YOU SHOULD NOT ACCESS OR USE OUR SITE OR ENGAGE IN COMMUNICATIONS WITH US CONCERNING OUR SERVICES. BY USING OUR SITE OR SERVICES, YOU AGREE TO THIS PRIVACY POLICY.

OUR SITE IS INTENDED FOR USERS LOCATED IN THE UNITED STATES AND IS NOT INTENDED FOR USERS LOCATED IN OTHER COUNTRIES, INCLUDING THE EUROPEAN UNION AND THE EUROPEAN ECONOMIC AREA.

1. INTRODUCTION AND PURPOSE

Legacy Wealth Management, LLC (also referred to herein as “Legacy,” “we,” “us,” or “our”) is committed to protecting the privacy and security of the personal information we collect, use, share, and otherwise process as part of our business. This Privacy Policy (the “**Policy**”) describes how Legacy processes and uses the personal information that we collect through our website, legacywealth.com, as well as other websites that direct to or otherwise contain a link to this Privacy Policy (collectively the “**Site**”), download, access, or otherwise provide to us in connection with our products, devices, software, and services (the “**Services**”).

This Privacy Policy governs your use of our Site and Services. By using our Site or Services, you hereby acknowledge and agree to this Privacy Policy and our Terms and Conditions.

2. INFORMATION WE MAY COLLECT

We may collect and process the following types of personal information from you for the purposes listed below. The information we collect depends upon things such as the nature of our relationship, the method you communicate with us, the Services you use, the purpose for your interaction with us, and the choices you make.

- **Contact Information:** If you contact us through the Site, sign up for communications, request information, or otherwise communicate with us, we may collect your name, email address, telephone number, mailing address, and the contents of your message or inquiry
- **Usage Information:** When you visit the Site, view or search content, install applications or software, create or log into your account, or use our Services, we and our third-party service providers may automatically collect certain usage or network activity information from your browser, mobile device, computer, tablet, or other devices or browsers you use, which includes the date and time of your visit, your Internet Protocol (IP) address, unique device identifier, domain server, your browser type, operating system, the referring web page, access time, cookies, and data about which pages you visit. We may also collect information regarding your interactions with the Services or our advertising. For more information about cookies and similar technologies, see Section 5 below.

- **Social Media Information:** If you engage with us on third-party social media platforms, such as Facebook, Instagram, or LinkedIn, we may collect and aggregate the personal information through your engagement with us, including all content, messages, and information that you provide to us and that you make publicly available on the profile through which you submitted such information to us.
- **Account Information:** If you register for and use the Client Portal, we collect the email address you use to create and access your account, basic profile information you choose to provide or update (such as your contact details and preferred communications), and financial information you choose to input or upload (for example, information about assets, liabilities, accounts, holdings, transactions, goals, or similar planning information). You may also upload documents to the Client Portal. The specific information available to view or update may vary based on your relationship with Legacy and the features we make available.
- **Client and Former Client Financial Information:** For clients and former clients, we may collect nonpublic personal information (e.g. Social Security number, date of birth, income, investment preferences, account balances, transaction history, parties to transactions, etc.) as necessary to provide advisory services, handled in accordance with our separate Client Information Privacy Policy. We may also obtain information from you to evaluate your application or verify your identity, or information from other companies about contracts or accounts transferred to us.
- **Communications Data:** If you contribute to the Site, provide us with feedback, ask us questions, or otherwise communicate with us, in addition to your Contact Information, we may collect the subject matter of your message, any comments, content, or other information that you choose to provide, and other information needed to respond to your communication. If you request information about our Services, we may also collect information you choose to share about your goals, preferences, timeline, and other relevant details.

3. HOW WE MAY USE YOUR INFORMATION

We may use the information described above in connection with the following business or commercial purposes or otherwise to the extent permitted by law:

- **Providing Our Products and Services To You:** We use your information to provide our products and Services, which includes making our Site, Services, and our content available to you, to serve you the content and functionality you request, to provide and deliver products, troubleshooting, and personalizing our Services, to offer you goods and services which may be of benefit to you, to communicate about our Services and respond to your feedback, requests, questions, or inquiries, to enhance your experience and provide you with a more personalized and interactive experience.
- **Operating Our Business:** We use your information to operate our business, such as to obtain or maintain insurance coverage; manage risks; obtain professional advice; to mitigate risks to the privacy and security of our Site, Services, and operations, including fraud or phishing detection; to maintain our databases and back-ups; to enforce our Terms and Conditions; to comply with any contractual obligations; to manage our relationships with you; and to comply with your instructions or requests.
- **Communicating With You:** We use your information to communicate with you, such as to contact you directly by mail, telephone, email, SMS, or other electronic messaging service in order to respond and provide the appropriate assistance and response to you; to extend offers of goods and services or information that may be of interest to you; to keep records of our communications with you; to determine user interests; for usage analytics

purposes; and to administer a promotion, survey, or other customer engagement features. You may unsubscribe from marketing communications at any time by following the unsubscribe instructions in our Constant Contact emails or by contacting us at legacy@legacywealth.com. Please see the “Your Rights and Choices Regarding Your Personal Information” Section of this Policy for more information. Please note that even if you opt out of marketing communications, we may still send you transactional or relationship messages, such as those about your account or our ongoing business relations.

- **Fraud, Security, Legal Enforcement and Compliance:** We use your information to protect the security and integrity of our business, the Site, and our Services, such as to enforce our agreements with you, to comply with federal, state, or local laws; to comply with a civil, criminal, or regulatory inquiry, investigation, subpoena, or summons; to cooperate with law enforcement agencies concerning conduct or activity that we may believe violates applicable law; and to establish, exercise, defend legal rights or claims, whether in court, administrative, or other proceedings.

4. HOW WE MAY DISCLOSE YOUR INFORMATION

We may disclose or share your personal information described above to the following types of third parties:

- **Service Providers:** We may share your personal information with our third-party service providers who perform functions on our behalf or at your direction for the purposes described in this Policy. We require these service providers to maintain the confidentiality and security of personal information they process on our behalf and to use personal information only for the purposes for which we disclose it to them.
- **Acquisition and Similar Transactions:** If we sell, transfer, or otherwise share some or all of our assets in connection with a merger, reorganization, liquidation, dissolution, bankruptcy, or sale of assets, we may disclose your personal information as a part of the assets transferred because of the transaction. For example, if another company acquires us, we will share your personal information with that company.
- **In Response to Legal Process or Defending Legal Claims:** We may disclose personal information as required by law, court orders, subpoena, or other legal process or if we reasonably believe such action is necessary to comply with the laws.
- **Professional Advisors:** We may share your personal information with our attorneys, accountants, and/or other fiduciaries and consultants that need access to your information to provide operational or other support on our behalf.
- **With Your Consent or at Your Direction:** We may ask, from time to time, if you would like us to share your personal information with other unaffiliated third parties who are not described elsewhere in this Policy. We may disclose your information in this context with your permission or upon your direction.
- **Third Parties:** We may provide personal information about you to third parties that may offer services specifically requested by you.

We do not share information with non-affiliated third parties for their independent marketing purposes.

5. COOKIES AND TRACKING TECHNOLOGIES

A “cookie” is a small file created by a web server that can be stored on your device (if you allow) for use either during a particular browsing session (a “session” cookie) or a future browsing session (a

“persistent” or “permanent” cookie). “Session” cookies are temporarily stored on your device and only last until they expire at the end of your browsing session. “Persistent” or “permanent” cookies remain stored on your device until they expire or are deleted by you. Local stored objects (or “flash” cookies) are used to collect and store information about your preferences and navigation to, from, and on a website. First-party cookies are set by the website you are visiting, and they can only be read by that site. Third-party cookies are set by a party other than that website.

In addition to cookies, we may use other data collection technologies, such as Internet tags, web beacons, pixels, (clear gifs, pixel tags, and single-pixel gifs), and navigational data collection (log files, server logs, etc.) that can be used to collect data as you navigate through and interact with a website. For example, web beacons are tiny graphics with unique identifiers that are used to understand browsing activity. UTM codes are strings that can appear in a URL when you move from one web page or website to another. The string can represent information about your browsing, such as which advertisement, page, or publisher sent you to the receiving website.

Cookies and Similar Technologies We May Use And Why We Use Them?

To optimize the user experience and with your consent where required by law, our Site uses cookies and similar tracking technologies to operate core features, understand usage, improve performance and design, and enhance security. The technologies we use may include cookies, web beacons (also called pixel tags or clear GIFs), local storage, SDKs, and tags/scripts. These technologies may collect information such as device identifiers, browser type and settings, operating system, IP address (which may be considered personal information under applicable law), general location, referring/exit pages, pages viewed, links clicked, time spent, and other interactions with the Site.

Cookies may be set by Legacy (first-party) and by third parties that provide services to us (third-party), including our hosting, analytics, security, and recruiting vendors.

The cookies and similar technologies used on the Site include the following:

Essential: Essential cookies are strictly necessary for basic features and functionality of the Site and do not require your consent. Without these essential cookies, the Site will not perform properly, and we may not be able to provide you with certain Services you have asked for, provide access to secure areas, and choices you have made for better functionality cannot be provided.

Functionality: Functionality cookies help us customize content on the Site based on your preferences. We use functionality cookies to remember choices you’ve made or information you’ve provided, such as your username or the region you are in. This allows us to tailor your experience on the Site to your preferences.

Analytics and Performance: We may use analytics and performance tools, such as Google Analytics, to help provide us with information about traffic to our website and use of our website, which Google may share with other services and websites that use the data collected to contextualize and personalize the ads of its own advertising network. We may use analytics tools to collect information about your use of the Services and enable us to improve the way they work and operate, information regarding what the most frequently visited pages on the Site are, help us record and debug any issues you may have with the Services, and show us how effective our advertising is. These analytics cookies do not allow us to see the usage of a single user but does allow us to see overall patterns of usage on the Services. We do not examine this information for individually identifying information, but we do use this information to understand the traffic on our Services.

Google Analytics. We may use Google Analytics to collect and process statistical data about the number of people using the Services and to better understand how they find and use the Services. The data collected includes data related to your device/browser, your IP address, and on-site activities to measure and report statistics about user interactions. The information stored is reduced to a random identifier. Any data collected is used in accordance with this Policy and Google's privacy policy. You may learn more about Google Analytics by visiting <https://www.google.com/policies/privacy/partners/> and <https://support.google.com/analytics/answer/6004245>. You can learn more about Google's restrictions on data use by visiting the Google Privacy Policy at: <https://www.google.com/policies/privacy>. To opt-out of Google Analytics, visit <https://tools.google.com/dlpage/gaoptout> and install the opt-out browser add-on feature. For more details, visit the "Google Analytics opt-out browser add-on" page located at <https://support.google.com/analytics/answer/181881?hl=en>.

Other Similar Technologies. In addition to cookies, we may use automatic data collection technologies, such as Internet tags, web beacons (clear gifs, pixel tags, and single-pixel gifs), and navigational data collection (log files, server logs, etc.) to collect data as users navigate through and interact with the Services, including relating to your viewing of any video content. For example, web beacons are tiny graphics with unique identifiers that are used to understand browsing activity. In addition, UTM codes are strings that can appear in a URL when you move from one web page or website to another. The string can represent information about browsing, such as which advertisement, page, or publisher sent the user to the receiving website. By viewing any video content on the Site, you consent to the collection of data related to your accessing of such content, including any automatically collected data.

Advertising Cookies and Similar Technologies. Advertising cookies and other similar technologies used by us are used to display targeting promotions or advertisements based on your use of the Services and interests and to manage our use of advertising resources. These technologies collect information about your activities on this and other sites to provide you with interest-based advertising. You can learn more about interest-based advertisements and your opt-out rights and options from members of the Network Advertising Initiative ("NAI") on its website (www.networkadvertising.org) and from members of the Digital Advertising Alliance ("DAA") on its website (www.aboutads.info). We do not control third parties' collection or use of your information to serve interest-based advertising. However, these third parties may provide you with ways to choose not to have your information collected or used in this way. You can also opt out of receiving targeted ads from members of the NAI on its website.

Opting out of interest-based advertising does not mean that you will no longer see any advertisements. You will still see advertisements, but they will be general and untailored to your specific interests and activities. In general, opt-outs must be performed on each device and browser that you wish to have opted out. If your browser is configured to reject cookies when you visit these opt-out webpages, or you subsequently erase your cookies, use a different device or web browser, or use a non-browser-based method of access (e.g., a mobile app), your NAI or DAA browser-based opt-out may not, or may no longer, be effective. Aliya supports the advertising industry's Self-Regulatory Principles for Online Behavioral Advertising. We expect that ad networks we directly engage in to serve you interest-based advertising will do so as well, though we cannot guarantee their compliance. We are not responsible for effectiveness of, or compliance with, any third parties opt-out options or programs, or the accuracy of their statements regarding their programs.

Choices About Cookies and Similar Technologies. You may choose not to allow certain cookies by setting your browser to refuse all or some browser cookies or to alert you when cookies are being set. For more information on how to modify your browser settings to block or filter cookies, visit <http://www.aboutcookies.org/>. You may learn more about internet advertising practices and related consumer resources at <http://www.aboutads.info/consumers/>, <http://www.networkadvertising.org/choices>,

and <http://youronlinechoices.eu/>. These settings may affect your enjoyment of the Services' functionality. Adjusting the cookie settings may not fully delete all the cookies that have already been created. To delete them, you should review your web browser settings after you have changed your cookie settings. In addition to the above, the links below provide additional information about how to disable cookies or manage the cookie settings:

- **Google Chrome:** <https://support.google.com/chrome/answer/95647?hl=en>
- **Firefox:** <https://support.mozilla.org/en-US/kb/enable-and-disable-cookies-website-preferences>
- **Microsoft Edge:** <https://support.microsoft.com/en-us/windows/manage-cookies-in-microsoft-edge-view-allow-block-delete-and-use-168dab11-0753-043d-7c16-ed5947fc64d>
- **Safari:** <https://help.apple.com/safari/mac/8.0/en.lproj/sfri11471.html>

Online Tracking Signals. We do not currently recognize browser settings or signals of tracking preferences, which may include “Do Not Track” instructions. “Do Not Track” is a web browser setting that seeks to disable the tracking of individual users’ browsing activities. We adhere to the standards set out in this Policy and do not currently respond to “Do Not Track” signals on the Services or on third-party websites or online services where we may collect information.

Visual Materials and Consent to Collect, Use, And Disclose Viewing History. The Services may display live or prerecorded videos or similar audio-visual materials (“Videos”). We are not in the business of delivering audiovisual materials. Rather, the display and use of Videos on the Services is incidental to our business and merely a peripheral part of our marketing strategy. The provision of Videos on our Services is not an admission by us, and it shall not otherwise be interpreted, in any form or manner, to mean that we are a “video tape service provider” for purposes of the Video Privacy Protection Act (codified as amended at 18 U.S. Code § 2710) (“VPPA”) or that we are otherwise subject to the VPPA.

We may collect personal information with respect to your viewing, streaming, or otherwise accessing such Videos and we may disclose such personal information regarding your video-viewing history on the Services to third parties using cookies, pixels, or other tracking technologies, to facilitate or assist with our marketing and advertising campaigns. By viewing, streaming, or otherwise accessing Videos on the Services, you hereby acknowledge, agree, and consent to our collection, use, and disclosure of such personal information regarding your video-viewing history on the Services.

We may use tracking technologies provided by YouTube as part of our services and/or embed YouTube Videos on the Services. These tracking technologies enable us to understand and improve our marketing efforts, track the performance of any Video content we have, and provide you with a more personalized experience. With respect to YouTube Videos embedded on our Services, no data about you will be transferred to YouTube if you do not play the Videos. YouTube may collect information relating to your visit to our Services, including the referring IP address, device, and pages you accessed on our Services. Additional information on the purpose and scope of data collection and processing by YouTube can be found in YouTube’s/Google’s Privacy Policy. By viewing any videos embedded on our Services or as part of the products and services that we offer, you consent to the disclosure of information to YouTube through its tracking technologies

By viewing, streaming, or otherwise accessing Videos on the Services, you hereby acknowledge, agree, and consent to our collection, use, and disclosure of such personal information regarding your video-viewing history on the Services.

Web Scraping. You are strictly prohibited from using any automated system, software, or other methods, including but not limited to scripts, bots, crawlers, scrapers, or other data mining tools, to access, acquire, copy, monitor, or collect any data, content, or other information from the Services without prior written consent from us. This prohibition extends to the use of any technology designed to bypass or circumvent measures we employ to restrict access to certain content or areas of the Services.

6. RETENTION OF PERSONAL INFORMATION

We retain your personal information only for as long as is necessary to fulfill the purposes for which it was collected, to comply with our business requirements and legal obligations, to resolve disputes, to protect our assets, to provide our services, and to enforce our agreements. Specific retention periods vary based on the type of information and applicable legal requirements. We take reasonable steps to delete personal information we collect when it is no longer required for these purposes.

7. SECURITY AND PROTECTION OF PERSONAL INFORMATION

We recognize the importance of safeguarding your personal information and we endeavor to maintain reasonable appropriate physical, technical, and organizational safeguards to protect your personal information against accidental loss and unauthorized access, use, alteration, or disclosure, and to detect fraudulent identity verification activity and mitigate risks concerning your personal information.

While our security measures seek to protect your information in our possession, no security system is perfect, and no data transmission is 100% secure. As a result, while we strive to protect your information, we cannot guarantee or warrant the security of any information transmitted to or from the Site, or otherwise through our Services. We are not responsible for circumvention of any privacy settings or security measures contained on the Site. We will endeavor to notify you in accordance with applicable law if we become aware of a security incident that affects your personal information.

8. YOUR RIGHTS AND CHOICES REGARDING YOUR PERSONAL INFORMATION

Depending on where you live in the United States, you may have certain rights relating to your Personal Information, which may include those described below. We will respond to requests from individuals in accordance with applicable law; however, we reserve the right to deny any requests where appropriate and permitted by applicable law. Please use the “Contact Us” details provided at the end of this Policy to exercise your rights and choices under this Policy.

Email Opt-Out. If you no longer wish to receive communications from us via Constant Contact email, you may opt-out by clicking the “unsubscribe” link at the bottom of those emails, and you may opt-out of other communications by contacting us via the “Contact Us” details at the end of this Policy and providing your name and email address so that we may identify you in the opt-out process. Once we receive your instructions, we will promptly take corrective action.

Cookies. You may be able to set up your browser to refuse all or some browser cookies or to alert you when cookies are being sent. You may also adjust your cookie preferences by using the cookies consent banner, if available.

Accuracy and Updating Your Information. Our goal is to keep your personal information accurate, current, and complete. If you have a Secure Client Portal account, you may update certain information by logging in, or by letting us know via the “Contact Us” details at the end of this Policy. We are not

responsible for any losses arising from any inaccurate, inauthentic, deficient, or incomplete personal information that you provide to us.

Do Not Track. Some web browsers may transmit “Do Not Track” signals to the websites and other online services with which the browser communicates. We do not currently recognize browser settings or signals of tracking preferences, which may include “Do Not Track” instructions.

Complaints. If you believe your rights relating to your personal information have been violated, please contact us via the “Contact Us” details provided at the end of this Policy.

California Residents. Under California Civil Code Section 1798.83, California residents who provide personal information in obtaining products or services for personal, family, or household use may be entitled to request and obtain from us once each calendar year information about the information we shared, if any, with other businesses for direct marketing uses. We do not currently share your personal information with third parties for those third parties’ direct marketing purposes. Please be aware that not all information sharing is covered by California’s “Shine the Light” requirements, and only information regarding covered sharing (if any) will be included in our response. As a part of the California Online Privacy Protection Act, all users of our Site may make any changes to their information at any time by contacting us at legacy@legacywealth.com.

9. **INDIVIDUAL RIGHTS**

To the extent you are a resident of certain U.S. states with comprehensive state privacy laws, you may be eligible for one or more of the following consumer rights where authorized by applicable U.S. state privacy laws. This section provides an overview of these rights which we honor where required by applicable law:

- **Right to Access.** Subject to certain conditions set forth in the applicable U.S. state privacy laws, you have the right to know and see what personal information we have collected about you and receive a copy of such information in a portable format, purposes for which we collect your personal information, recipients of your personal information to whom we disclose or share, which in some states may include categories of personal information collected, categories of sources of collection, business or commercial purposes for data processing, and categories of third parties with whom we disclose that information.
- **Right to Correct.** Subject to certain conditions and exceptions set forth in the applicable U.S. state privacy laws, you have the right to request that we correct any inaccurate personal information that we have collected about you.
- **Right to Delete.** Subject to certain conditions and exceptions set forth in the applicable U.S. state privacy laws, you have the right to request that we delete the personal information we have collected about you.
- **Right to Opt-Out.** Residents of certain states may have the right to direct us to stop selling, and for residents of California, sharing your personal information to third parties and to refrain from doing so in the future. Residents of certain states also have the right to opt out of targeted advertising and profiling based on your personal information.
- **Right to Non-Discrimination.** You have the right not to be discriminated against for exercising any of your rights under any applicable U.S. state privacy laws.

- **Right to Appeal.** To the extent the applicable U.S. state privacy laws provide such rights, you may appeal our denial to act on your consumer rights under the applicable state privacy laws within a reasonable time. We will respond within designated period for responding to U.S. data subject requests and may exercise the right to extend this response period (to the extent authorized by applicable state privacy laws).

How to Exercise Your Rights. You may submit a request to exercise one of the above rights by calling 901-758-9006 or emailing legacy@legacywealth.com.

In your request, please specify the right you wish to exercise and provide enough information to help us verify your identity and locate your records. We may request additional information solely to verify your identity and protect privacy and security. If we deny your request (for example, where we must retain certain records for legal, security, or equal employment opportunity obligations), we will provide a reason where required by law.

Authorized Agents. Where permitted by law, you may designate an authorized agent to submit a request on your behalf; we may require proof of authorization and your identity. If we deny your request, you may appeal by calling 901-758-9006 or emailing legacy@legacywealth.com and indicating “Privacy Request Appeal” in the subject line.

Non-Discrimination. We will not discriminate against you for exercising your privacy rights.

Excessive Requests. If requests from a consumer are manifestly unfounded or excessive, in particular because of their repetitive character, we may either (1) charge a reasonable fee, or (2) refuse to act on the request and notify the consumer of the reason for refusing the request. If we charge a fee, the amount will be based upon the administrative costs of providing the information or communication or taking the action requested.

GLBA Carve-Out. The rights described in this section generally do not apply to nonpublic personal information collected, processed, or disclosed pursuant to the Gramm-Leach-Bliley Act, which is subject to our Client Information Policy.

Opt-Out Preference Signals/Universal Opt-Out Mechanism. We do not sell or share your personal information for targeted advertising. If our cookie practices change to constitute a “sale” or “sharing” under California law, we will provide a “Do Not Sell or Share My Personal Information” link and honor opt-out preference signals (such as Global Privacy Control) consistent with applicable law).

10. THIRD-PARTY SITES

The Site may link to third-party websites, services, or content that Legacy does not control. This Policy does not apply to those third parties. The inclusion of a link on the Site does not imply endorsement of the linked site or service by us. We are not responsible for the privacy practices or content of third-party sites. We encourage you to review each third-party site’s terms and privacy policies before providing any personal information.

11. CHILDREN’S PRIVACY

The Site is not directed to children under 13, and we do not knowingly collect personal information from children under 13. If we learn we have collected personal information from a child under 13, we will delete it in accordance with applicable law. If you are a parent or guardian and believe we have collected information from a child under 13, please contact us immediately using the contact information provided in this Policy.

12. UPDATES AND CHANGES TO THIS POLICY

We may update our Privacy Policy periodically. If we make material changes to how we treat our users' personal information, we will post the updated Policy on this page with a new "Last Updated" date. Your continued use of the Site after the effective date of any changes constitutes your acceptance of the revised Policy. You are responsible for periodically visiting this page to check for any updates.

13. CLIENT PRIVACY CHOICES AND LIMITS ON SHARING

If you become a client of Legacy, your nonpublic personal information will be handled under our Client Information Policy describing our privacy practices with respect to nonpublic personal information collected in connection with providing financial services. That notice will govern where it applies. If you terminate your relationship with Legacy, we will continue to protect your information in accordance with our client privacy notice and applicable law.

Under federal law, clients have the right to limit certain sharing of nonpublic personal information, including sharing for affiliates' everyday business purposes regarding information about your creditworthiness; affiliates using your information to market to you; and sharing with non-affiliates to market to you.

State laws and individual companies may provide additional rights. If you share a joint account, your choices apply to everyone on the account.

14. CONTACT US

If you have questions about this Privacy Policy, our privacy practices, or your choices, please contact us using the information below. Please note, if your communication is sensitive, you may wish to contact us by postal mail.

In Writing: Legacy Wealth Management, LLC

1715 Aaron Brenner Drive

Suite 301

Memphis, TN 38120

By Email: legacy@legacywealth.com

By Phone: 901-758-9006