



SHEPHERD  
WEALTH PARTNERS

## Privacy Policy

Shepherd Wealth Partners is committed to safeguarding the personal information of our customers. This notice will help you understand how we safeguard and use the information we collect. These policies pertain to non-public personal information about current and former clients.

**Why and How We Collect Personal Information:** We collect information that assists us in servicing your financial needs. This information helps us provide you with a high standard of customer service, process your transactions, provide products that may interest you and fulfill legal and regulatory requirements. The personal information we collect includes information collected on applications and related forms such as, name, address, social security number, bank reference, annual income and net worth.

**How We Protect Information:** We maintain and protect the confidentiality of your personal information by utilizing physical, electronic and procedural safeguards.

Under North Carolina law, as well as our own ethical standards, information you provide us is not disclosed without your consent, except as required by law, rules or regulations under which we practice.

Also, in the course of our engagement with you we may consult with outside technical support. These consultations may be with other financial, tax or accounting professionals, computer professionals or from our various software vendors. These outside professionals may request a copy of a computer file or other document in order to provide the necessary consultation. These consultant/software vendors and computer professionals with whom we deal have their own stringent privacy rules and procedures to safeguard and protect files sent to them.

Please contact us at 704-443-8455 if you have any questions or concerns about this privacy statement.

Shepherd Wealth Partners only transacts business in states where it is properly registered, or excluded or exempted from registration requirements. Shepherd is currently registered in North Carolina and South Carolina.