



FIDELEON

Fideleon Wealth Advisors LLC
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Privacy Policy

Our Commitment to You

Fideleon Wealth Advisors LLC (also referred to as “Firm,” “we,” and “our”) is committed to safeguarding the personal information of our clients and prospective clients (also referred to as “you” and “your”) that we obtain in connection with providing advisory services, as described in this Privacy Policy (“Policy”).

We protect the security and confidentiality of nonpublic personal information (“NPI”) we maintain and implement administrative, technical, and physical safeguards designed to ensure that such information is used only for appropriate business purposes related to providing, administering, and servicing our relationship with you.

We do not sell your NPI. We do not disclose your NPI to nonaffiliated third parties except as permitted or required by law, including for ordinary business purposes associated with servicing your account, or as you authorize.

Why You Need to Know

Privacy laws require us to explain how we collect, share, and protect NPI and whether you may limit certain sharing. We provide an initial privacy notice at or before establishing a customer relationship and provide annual or revised notices as required by applicable law.

What Information We Collect From You (as applicable)

- Contact information, website/contact-form information, and communications you send us
- Date of birth, Social Security/taxpayer ID, and government-issued identification information
- Employment, income, expenses, assets, liabilities, and net worth
- Account numbers and account information, including at other institutions you disclose to us
- Investment activity, experience, objectives, risk tolerance, restrictions, and related profile information

What Information We Collect From Other Sources (as applicable)

- Custodial, brokerage, advisory, account, and investment questionnaire records
- Transaction and account information from custodians, brokers, advisers, or other financial institutions
- Consumer reporting, identity-verification, or fraud-prevention information, if used

- Other information needed to service your relationship or meet legal/regulatory obligations

How We Protect Your Information

To safeguard your NPI from unauthorized access and use, we maintain administrative, technical, and physical security measures. These measures may include (as appropriate) secure access controls, encryption, multi-factor authentication, secure file storage, vendor due diligence and oversight, employee training, and a secure office environment.

We oversee service providers that access NPI through risk-based due diligence and monitoring and require appropriate safeguards, confidentiality, limited use, and timely incident notification.

We maintain written policies and procedures designed to address reasonably foreseeable internal and external risks to customer information. Consistent with applicable law, we maintain an incident response program designed to detect, respond to, and recover from unauthorized access to or use of customer information. When required, we will provide written notice to affected individuals as soon as practicable and within applicable legal timeframes.

How We Share Your Information

We may share your NPI as described below. We do not share your NPI with affiliates, if any, or nonaffiliated third parties for their own marketing purposes.

Reason We May Share Your NPI	Do we share?	Can you limit?
For everyday business purposes, such as processing transactions, maintaining accounts, responding to court orders and legal investigations, or reporting to regulators	Yes	No
For our service providers and professional advisers, such as custodians, broker-dealers, technology vendors, compliance consultants, auditors, and attorneys, when necessary to provide services to you	Yes	No
For fraud prevention and identity verification (including, as applicable, with consumer reporting agencies)	Yes	No
With persons you authorize, such as your attorney, CPA, family members, or other designated representatives, based on your written instructions	Yes	Yes (you may revoke or change in
For affiliated or related entities that support advisory services, supervision, operations, or compliance	Yes	No

Information About Former Clients

We do not disclose NPI about former clients to nonaffiliated third parties except as permitted or required by law (for example, for tax reporting, regulatory inquiries, or to resolve disputes).

Changes to This Privacy Policy

We may revise this Policy from time to time. If we make a material change to our privacy practices, we will provide you with a revised notice as required by law. We will not change our privacy practices in a way that is inconsistent with this notice without providing any notice and choices required by applicable law.

Questions

If you have questions or concerns about this Policy, or you would like to revoke or change an authorization to share information with an authorized person, please contact the Firm using the contact information on the first page and ask to speak with the Compliance Department.