

Privacy Policy

EPG Wealth Management, LLC (“EPG Wealth”) recognizes that its clients have an expectation that EPG Wealth will maintain the confidentiality of clients’ nonpublic personal information. Consequently, EPG Wealth has adopted this privacy policy concerning information obtained during the servicing of client’s account(s).

To Whom This Policy Applies

This notice applies to all our clients who enter into an advisory services agreement with us. Even if you are no longer a client, our privacy policy will continue to apply to you.

Nonpublic information

We do not disclose any non-public personal information about you to any non-affiliated third parties, except as permitted by law. In the course of servicing your account, we may share some information with our service providers, such as transfer agents, custodians, broker-dealers, accountants, consultants, and attorneys.

We restrict internal access to non-public personal information about you to employees, who need that information in order to provide products or services to you. We maintain physical and procedural safeguards that comply with regulatory standards to guard your non-public personal information and to ensure our integrity and confidentiality. We will not sell information about you or your accounts to anyone. We do not share your information unless it is required to process a transaction, at your request, or required by law.

Sources of Personal Information

We collect personal information about you from meetings with you and on applications or other forms you have submitted to EPG Wealth, as well as information about your investments or transactions with us or others (such as third-party service providers or fund companies) from other sources.

Opt-Out Provision

Since EPG Wealth does not sell or share any personal information an “opt out” provision would not be applicable to this privacy policy. Clients may call (404) 809-3680 to request further information regarding this policy.

You will receive a copy of our privacy notice prior to or at the time you sign an advisory agreement with our firm. Thereafter, we will deliver a copy of the current privacy policy notice to you on an annual basis. Contact our main office at (404) 809-3680 if you have any questions regarding this policy.