



Privacy Policy

Updated: March 1, 2025

Insight Strategic Wealth, LLC is committed to client confidentiality and the protection of your privacy. The following information is provided, as required by law, to help you understand our privacy policy and how we will handle and maintain confidential personal information as we fulfill our obligations to protect your privacy. “Personal information” refers to the nonpublic financial information obtained by Insight Strategic Wealth, LLC in connection with carrying out our services.

Information We Collect

Insight Strategic Wealth, LLC collects personal information as part of our relationship to you to provide client services and fulfill legal and regulatory requirements. The type of information Insight Strategic Wealth, LLC collects may include:

- Information Insight Strategic Wealth, LLC receives from you on forms (such as name, address, Social Security number, profile documents, assets and income);
- Information you provide Insight Strategic Wealth, LLC directly about your personal finances or personal circumstances or which Insight Strategic Wealth, LLC may receive from brokerage statements or other information you authorize Insight Strategic Wealth, LLC to receive.

Information Disclosed in Administering Products and Services

Insight Strategic Wealth, LLC will not disclose personal information about current or former clients to non-affiliated third parties except as permitted or required by law. Insight Strategic Wealth, LLC does not sell any personal information about you to any third party. Insight Strategic Wealth, LLC will not disclose personal information without your authorization, except as required or permitted by law.

Procedures to Protect Confidentiality and Security of Your Personal Information

Insight Strategic Wealth, LLC has procedures in place that limit access to personal information to those employees who need to know such information in order to perform business services. In addition, Insight Strategic Wealth, LLC, maintains physical, electronic and procedural safeguards to guard your non-public personal information.

Insight Strategic Wealth, LLC will update its policy and procedures when necessary to ensure that your privacy is maintained and that Insight Strategic Wealth, LLC conducts business in a way that fulfills our commitment to you. If Insight Strategic Wealth, LLC makes any material changes in its privacy policy, we will make that information available to clients through our Web site and/or other communications.