

Parkshore Wealth Management (“we,” “our,” or “us”) requires that you provide current and accurate financial and personal information. Parkshore Wealth Management and its employees are committed to protecting your privacy and to safeguarding that information.

Information We Collect

Whether in person, by phone, email, by registering on one of our websites, <https://wb.parkshorewealth.com>, <https://parkshorewealth.com>, or by some other method, you provide us with non-public personal information. This information may include such information as name(s), date of birth(s), social security number(s), email address(s), age(s), mailing address(s), telephone number(s), fax number(s), financial information, billing information, investment profile parameters, etc. We may gather user information related to IP addresses, cookie identifiers, and website activity that are collected for targeted advertising.

How We Use Information We Collect

We use the information that we collect to provide you with the various services that we offer. By visiting our site, third parties (such as AdRoll) may place cookies on your browser for targeted advertising purposes. This data may be used by third parties (such as AdRoll) to target advertising on other sites based on your online activity.

Safeguarding Customer Documents

No data transmitted over the internet can be guaranteed to be 100% secure. Therefore, we cannot guarantee or ensure the security of any information that you transmit to us and you do so at your own risk.

During regular business hours, access to your records is monitored so that only those with approval may access the files. During hours in which the company is not in operation, your records will be locked in accordance with our procedures.

Sharing Non-public Personal and Financial Information

Parkshore Wealth Management is committed to the protection and privacy of its customers’ and consumers’ personal and financial information. We will not share such information with any affiliated or non-affiliated third party except:

- When necessary to complete a transaction in a customer account, such as with the clearing firm or account custodians;
- When required to maintain or service a customer account;
- To resolve customer disputes or inquiries;
 - With persons acting in a fiduciary or representative capacity on behalf of the customer;
- In connection with a sale or merger of Parkshore Wealth Management’s business;
- To protect against or prevent actual or potential fraud, identity theft, unauthorized transactions, claims or other liability;
- To comply with federal, state or local laws, rules and other applicable legal requirements;
- In connection with a written agreement to provide investment management or advisory services when the information is released for the sole purpose of providing the products or services covered by the agreement;
- In any circumstances with the customer’s instruction or consent; or
- Pursuant to any other exceptions enumerated in the California Information Privacy Act

We are permitted by law to disclose the non-public personal information about you to governmental agencies and other third parties in certain circumstances (such as third parties that perform administrative or marketing services on our behalf or for joint marketing programs). These third parties are prohibited to use or share the information for any other purpose.

Former Clients

If you decide to close your account(s) or become an inactive customer, we will adhere to our privacy policies, which may be amended from time to time.

Changes to Our Privacy Policy

In the event there were to be a material change to our privacy policy regarding how we use your confidential information, we will provide written notice to you. Where applicable, you would be given an opportunity to limit or opt-out of such disclosure arrangements.

Opt-Out Provisions

It is not a policy of Parkshore Wealth Management to share non-public personal and financial information with affiliated or unaffiliated third parties except under the circumstances noted above. Since sharing under the circumstances noted above is necessary to service customer accounts or is mandated by law, there are no allowances made for clients to opt out.

If you would like to opt out of ongoing email marketing campaigns, you may use the “unsubscribe” link found in any such email.

Questions

If you have questions about this privacy notice or about the privacy of your customer information call our main number 916-797-3007 and ask to speak to the Chief Compliance Officer.