

January 1, 2024

Grant/Gross Mendelsohn dba GGM Wealth Advisors, LLC. Privacy Policy

Notice regarding compliance with the privacy provisions of the Gramm-Leach-Bliley Act (GLBA)

GGM Wealth Advisors, as a Registered Investment Advisory firm, is committed to safeguarding the confidential information of its clients. We hold all personal information provided to our firm in the strictest confidence. These records include all personal information that we collect from you in connection with any of the services provided by us. We have never disclosed information to nonaffiliated third parties, except as permitted by law, as set forth in paragraph 6 of our Investment Advisory Agreement. We do not anticipate any change in this policy and, were this policy to change; we would be prohibited under the law from doing so without advising you first. As you know, we use financial information that you provide to us to help you meet your personal financial goals while guarding against any real or perceived infringements of your rights of privacy. The procedures followed in connection with this privacy policy are listed below.

We limit employee and agent access to information only to those who have a business or professional reason for knowing, and only to nonaffiliated parties as permitted by law. (For example, federal regulations permit us to share a limited amount of information about you with a brokerage firm in order to execute securities transaction on your behalf, or so that our firm can discuss your financial situation with your accountant or lawyer.)

We maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk.

The categories of nonpublic personal information that we collect from a client depend upon the scope of the client engagement. It will include information about your personal finances, information about your health to the extent that it is needed for the planning process, and information about transactions between you and third parties.

For unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors, we also require strict confidentiality in our agreements with them and expect them to keep this information private. Federal and state regulators also may review firm records as permitted under law.

We do not provide information to mailing list vendors or solicitors for any purpose.

Personally identifiable information about you will be maintained during the time you are a client, and for the time thereafter that such records are required to be maintained by federal and state securities laws. After this required period of record retention, all such information will be destroyed.

Should you have any questions pertaining to our privacy policy or practices, please contact our office:

GGM Wealth Advisors
1801 Porter Street
Suite 500
Baltimore, MD 21230
Office: 410-685-9685
Toll Free: 1-800-966-9991
Fax: 410-752-1148
Michael@GGMWealthAdvisors.com