

# Privacy Policy

We are committed to protecting the privacy of our clients and their employees. Since we collect certain types of information when you visit our website and at the time when our online services are used, we believe that it is important to let you know what information is collected, how the collected information is used and protected.

## McKee Wealth Management Website

In visiting our website, we want you to know that you have control over your business and personal information. You can visit us on the web without telling us who you are or revealing any business and personal information whatsoever, including your email address.

## McKee Wealth Management Online Services

We encourage you to take advantage of McKee Wealth Management online services. When you use our online services, we can assure you that the personal information you provide us is managed with care.

In order to use these services, we will ask for information about you such as name, business, business address, and e-mail address. Within each of these service areas on our website, you will be informed of the manner in which information will be collected and used. We know how important your privacy is to you and we appreciate you trusting us to handle your business and personal information responsibly and with integrity.

## Your Personal Information

You do not have to give us personal information to visit our website. By personal information we mean data that is unique to an individual such as a name, address, social security number or telephone number. We request personal information from you at our site in order to deliver requested materials to you and deliver a service. We do not sell, trade or rent your personal information to others under any circumstances.

We collect only that personal information which you choose to provide to us. By using our website you agree to the uses of your personal information described in this notice. If at any time this policy changes, those changes will be posted to this page so that you are aware of our intent to better protect your privacy.

## Confidentiality Practices

At McKee Wealth Management, we support the concept of total confidentiality. We also hold our business associates and our affiliates to similar confidentiality standards. All personal information or other confidential information must be used and disclosed in a manner consistent with applicable federal and state statutes and regulations, contractual obligations, and McKee Wealth Management policies and procedures. Confidential information includes but is not limited to, protected health information, non-public financial information, and trade secrets.

Protected health information is individually identifiable health information that is transmitted or maintained by our clients and McKee Wealth Management in performance of our service

agreement. This includes information in electronic, paper and oral form. If an individual's past, present, or future medical information can be discovered from the information it is protected. Protected health information may be used and disclosed solely for McKee Wealth Management business activities related to health care operations.

Non-public financial information includes confidential information of a financial nature that is shared with McKee Wealth Management in the course of providing products and services to current, prospective or prior clients. This information is not otherwise available to the public and includes but is not limited to the following: credit history, financial benefits, business records, accounting, contracts, claims, policy information, and any other data financial in nature.

Trade secrets include any proprietary information of our current, prospective or prior clients that is obtained through the course of business activities, through the provision of products and services. This information is not otherwise available to the public and includes but is not limited to the following: business records, contracts, claims, products, business methods, data processing procedures, marketing strategies, pending projects or proposals, mailing lists, and any other information related to an organization's activities, products or services.

### Information Collection and Use

The information we collect is limited to the data elements on the prescribed forms. In the course of conducting our business we may share information you provide to us strictly on an as needed basis or otherwise required by law. In certain situations, and in no event contrary to applicable public policy, we would share information about you to: 1) our affiliated companies in order to provide a service to you; 2) a third party if reasonably necessary to enable them to perform services for us such as claims inquiries, appraisals, or the detection of fraud or material representations; 3) governmental authorities; 4) persons or organizations conducting legitimate research.

McKee Wealth Management does not use, disclose, sell or transfer any personal information without consent unless required or permitted by law or regulation. In cases of permitted disclosure, we will disclose information in compliance with applicable laws and regulations and will require the recipient to protect the information and use it only for the purpose provided.

### Online Tracking

Cookies are pieces of information that a site transfers to your computer's hard drive for record-keeping purposes. They can make the site more useful by storing information about your preferences at our site. It is almost standard for any interactive website to use cookies. Cookies do not identify a user, but they do identify a user's computer. Most browsers are set up to accept cookies. If you prefer, you can set your browser to refuse cookies.

We do not use cookies to track, report on activity when you are not on our site, or pass your data to other sites. We do not use cookies to collect personal information such as your email address. We do not combine information collected through cookies with other personal information. We do not knowingly make any of the foregoing information we collect available to anyone else. We make no attempt to look at or examine other cookies or information that may be stored on your computer.

### Use of E-mail

E-mail messages sent in clear text over the public Internet can be observed by an unintended third party. Non-encrypted Internet email communications may be accessed and viewed by other internet users without your knowledge and permission while in transit to us.

If you wish to keep your information private, please do not use email to communicate information to us or request information from us that you consider confidential. If you wish, you may contact us instead via telephone at the phone number provided elsewhere in this website.

### Correcting or Removing Your Personal Information

If you would like to correct any personal information you have provided to us or request that we remove your information from our records, email us at [info@mckeewealth.com](mailto:info@mckeewealth.com) with the correction or removal request.

### Links to Other Sites

We may provide links to other websites not owned or controlled by us that we think might be useful or of interest to you. We cannot however be responsible for the privacy practices used by other website owners or the content or accuracy of those other websites. Links to other websites do not constitute or imply endorsement by us of the websites, any products or services described on these sites or any other material contained in them. Contact those websites for their individual privacy policies.

### Changes to Our Privacy Policy

We reserve the right to make changes to our privacy policy. We encourage you to review the website and these terms periodically for any updates or changes. Your continued access or use of this website shall be deemed your acceptance of this privacy policy.