

PRIVACY POLICY

FUSE PARTNERS GROUP LLC and VISIONPOINT ADVISORY GROUP LLC
Fuse Partners Group LLC, and its subsidiaries VisionPoint Advisory Group LLC, Castleview Partners LLC, and Make Way Wealth LLC. (together "Fuse Partners Group", "we" or "our"), recognize the importance of protecting the privacy of our clients. Safeguarding your privacy is integral to our business practices, whether conducted online, via telephone, or within our premises. We aim to provide transparency regarding the collection, usage, and protection of your information.

Personal Information Collected

We collect specific personally identifying details, including your name, address, social security number, etc., sourced from application forms and various communications—be it electronic, telephonic, written, or in-person interactions with you or your designated representatives (such as attorneys or accountants). Additionally, we collect data concerning your brokerage accounts and related transactions, encompassing purchases, sales, account balances, inquiries, and similar activities.

Personal Information Disclosure

We maintain strict confidentiality of personal information acquired from our Clients, except under specific circumstances: (i) to facilitate our business relationship, strictly to individuals necessary for authorized transactions and services (e.g., broker-dealers, custodians, independent managers); (ii) for compliance evaluations by industry standard assessors (e.g., professional licensing authorities); (iii) shared with our attorneys, accountants, and auditors; or (iv) as mandated by law.

We are permitted by law to disclose the personal information to governmental agencies and select third parties in certain situations (e.g., third parties conducting administrative or marketing services on our behalf or participating in joint marketing programs). These entities are bound not to use or disseminate the information for other purposes. Should you choose to terminate our services or become an inactive customer, we will consistently uphold our privacy policy, subject to occasional amendments.

Safeguarding your information

We employ physical, electronic, and procedural measures consistent with pertinent federal or state standards to ensure security.

Modifications to our privacy policy or engagement with you

Our protocol concerning the collection and sharing of information may undergo occasional revisions. Prior to implementing any significant alteration to this policy, we will furnish you with notice regarding the impending change.

Questions

If you have any questions or concerns regarding this policy, please contact your advisor, or email us at service@vpadvisor.com.

