PRIVACY POLICY

Oak Wealth Advisors LLC respects your right to privacy. We are committed to maintaining the confidentiality, security, and integrity of all your personal information and details related to your accounts. Pursuant to Regulation S-P adopted by the Securities and Exchange Commission, Oak Wealth Advisors LLC keeps confidential all non-public personal information pertaining to each current and former client.

Oak Wealth Advisors LLC will not share your information unless:

1. You authorize us to disclose the information to individuals or entities including but not limited to your other professional advisors and/or service providers;
2. We are required to do so by judicial or regulatory process;

Oak Wealth Advisors LLC will not provide your consumer information, account numbers, or access numbers to any third-parties for use in telemarketing, direct mail or other marketing purposes.

Oak Wealth Advisors LLC takes the security of information seriously. We have security procedures in place to prevent access to client information. Physical, electronic, and procedural safeguards are in place and are updated as needed to protect information. We provide employee education about data security and client information confidentiality.

Each individual and/or entity affiliated with Oak Wealth Advisors LLC is aware of Oak Wealth Advisors LLC's privacy policy and has acknowledged his/her/its requirement to comply with same. In accordance with the Oak Wealth Advisors LLC privacy policy, each such affiliated individual and/or entity shall have access to information to the extent reasonably necessary for Oak Wealth Advisors LLC to perform its services for you, and to comply with the applicable regulatory procedures and requirements.

The disclosure of information contained in any document completed by you for processing and/or transmittal by Oak Wealth Advisors LLC in order to facilitate the business relationship between you and a non-affiliated third-party service provider (i.e. account custodian, insurance company, etc.) including information contained in any document completed and/or executed by you for Oak Wealth Advisors LLC (i.e. advisory agreement, client information form, etc.) shall be deemed as having been automatically authorized by you with respect to the corresponding non-affiliated third-party service provider.

Our privacy policy extends to the data collected from our clients even after our business relationships with them end.

Please contact us if you have any questions about our privacy policy or our obligations to you.