The Alchemists, LLC

Privacy Policy

Effective July 15, 2025

We recognize our relationships with current and prospective clients are based on integrity and trust. We work hard to maintain your privacy and to preserve the private nature of our relationship with you. We place the highest value on the information you share with us. We will not disclose your personal information to anyone unless it is required by law or at your direction. We will not sell your personal information. We want you to understand what information we collect, how we use it, and how we protect your personal information.

Why We Collect Your Information

We gather information about you so we can help design and implement the investment and financial planning related services we provide you, and to comply with the federal and state laws and regulations that govern us.

What Information We Collect and Maintain

We could collect the following types of “nonpublic personal information” about you:

- Information from our initial meeting or subsequent consultations about your identity, such as your name, address, social security number, date of birth, and financial information.
- Information we generate to service your financial needs.
- Information we could receive from third-parties, such as the custodian who holds your account(s).

What Information We Disclose

Federal law allows you the right to limit the sharing of your non-public information by “opting-out” of the following: sharing information with affiliates for everyday business purposes; sharing information about your creditworthiness; or sharing with affiliates or non-affiliates to market their services to you. We do not share your information under any of these circumstances.

We do not disclose nonpublic information about you to unaffiliated third-parties except as necessary for us to provide services to you, including broker-dealers, sub-advisers, account custodians, portfolio management and other financial software or web application providers, as permitted by law. You must provide your written consent, or “opt-in”, to allow us to share your nonpublic information with these parties.

How We Protect Your Personal Information

Your privacy is of the utmost importance to us. We restrict and limit access to client information only to those who need to carry out their business functions. We safeguard client information by preventing its unauthorized access, disclosure, or use. We maintain physical, electronic, and procedural safeguards to protect your confidential personal information. Arrangements with companies or independent contractors not affiliated with our firm will be subject to confidentiality agreements.

Former Clients

After you cease to be our client, we are required to maintain certain nonpublic information about you to comply with applicable federal and state regulations. Even if we cease to provide you with financial services, our Privacy Policy will continue to apply to you, and we will continue to treat your nonpublic information with strict confidentiality.

Contact Us

You are encouraged to contact us at (203) 518-0034 to discuss any questions regarding our privacy policies and procedures.