Wealth Solutions, Inc.
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Privacy Policy

Your privacy and safety of your data is important to us. This Privacy Policy document describes types of information that is or may be collected, used or shared by Wealth Solutions when you visit our website, or use our services.

If you have any additional questions or require more information about our Privacy Policy or about how we handle user data and personal information or wish to withdraw your consent for the continued collection, use or disclosure of your Personal Information, please feel free to contact us at (512) 600-9880.

Definitions

Wealth Solutions is based in The Woodlands, TX (referred to as "I", "Me", "Our", "Us" or "We"). As a customer of this service, you're a "User", "Visitor" or "You" according to this agreement. The Website or any services offered by us will be referred to as "Website" or "Service". External services or integrations like will be referred to as Applications "External Provider" or "External Service".

Data We Collect

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. This can include but is not limited to your Social Security Number, Date of Birth, Banking Information, Financial Account Numbers and/or Balances, Sources of Income, and Credit Card Numbers or Information. If you are no longer our customer, we may continue to share your information only as described in this notice.

Sharing your Personal Information

All Investment Advisers may need to share personal information to run their everyday business. In the section below, we list the reasons that we may share your personal information:

- For everyday business purposes – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus;
- For our marketing – to offer our products and services to you;
- For joint marketing with other financial companies;
- For our affiliates' everyday business purposes – information about your transactions and experiences and information about your creditworthiness; or
- For non-affiliates to market to you.

If you are a new customer, we may begin sharing your information on the day you sign our agreement. When you are no longer our customer, we may continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.

Data Retention/Collected Information

We retain collected information for as long as necessary to provide you with your requested service or unless and until you ask us to delete this information. Data we store, we'll protect within commercially acceptable means to prevent loss and theft, as well as unauthorized access, disclosure, copying, use or modification. Customer passwords which we may store are stored as a hash and the original password cannot be recovered.

Information Sharing Disclosure

We may communicate with you by email, SMS (text message), or telephone, in response to your inquiries or send you service-related announcements based on Personal Information you provide to us. We may also use your Personal Information to send you updates and other promotional communications if we received your agreement. If you no longer wish to receive email updates, you may opt- out at any time of receiving them by following the instructions included in each communication. This can be accomplished by selecting the "unsubscribe" link in an email. SMS opt-in and phone numbers collected for SMS communication purposes will not be shared with any third party or affiliates for marketing purposes.

Links To Other Websites

Our Website may contain links to and from third party websites or services that are not operated by us. If you follow a link to any of these third party websites, please note that these websites have their own privacy policies and we do not accept any responsibility or liability for these policies or practices. Please review the Privacy Policy of every website you visit before you submit any Personal Information to any of these websites.

Business Transfers

In the event Wealth Solutions substantially loses all of our assets, were acquired, or in the unlikely event that Wealth Solutions goes out of business or enters bankruptcy, your personal information would be one of the assets that is transferred or acquired by a third party which may continue to process your Personal Information. You acknowledge and consent that such transfers may occur, and are permitted by this Privacy Policy, and that any acquirer of our assets may continue to use your personal information as set forth in this policy.

Protecting Confidential Information

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards and secure files and building.

SMS Terms of Service

SMS For Consent Communication
The Phone Numbers obtained as part of the SMS consent process will not be shared with third parties for marketing purposes.

Types of SMS Communications: If you have consented to receive text messages from Wealth Solutions, you may receive text messages related to: appointment reminders, meetings, and follow-ups on cases.

For Example: Hello, Thank you for contacting Wealth Solutions, how can we help you? Reply Stop to opt-out at any time. Message and data rates may apply, for assistance, text Help or visit our Privacy Policy URL.

Message Frequency: Our SMS message frequency will be from 50 to 1000 text messages daily across all users.

Potential Fees for SMS Messaging: Many carriers charge a fee for each message sent or received. This can vary depending on the carrier's pricing structure and whether the message is sent domestically or internationally.

Opt-In Method: Customer will Opt-In for SMS messaging from Wealth Solutions through the Contact US URL, this agreement for SMS will not be shared with third parties for marketing purposes.

Opt-out: Customer will be able to opt out of SMS messaging from Wealth Solutions by replying STOP at any time to any received SMS message, once opted-out they will receive no further SMS communication. They can Opt back In at any time by replying START.

Help: If you are experiencing any issues, you can reply with the keyword HELP. Or, you can get help directly from us at (insert the link)
Additional Options:

- If you do not wish to receive SMS messages, you can choose not to check the SMS consent box on our forms.

Standard Messaging Disclosures:

- Message and data rates may apply.
- You can opt-out at any time by texting "STOP."
- For assistance, text "HELP" or visit our Privacy Policy page.
- Message frequency may vary

Federal & State Law

Federal law allows you the right to limit the sharing of your NPI by "opting-out" of the following: sharing for non-affiliates' everyday business purposes – information about your creditworthiness; or sharing with affiliates or non-affiliates who use your information to market to you. State laws and individual companies may give you additional rights to limit sharing. Please notify us immediately if you choose to opt out of these types of sharing.

Changes

We reserve the right to update or modify this Privacy Policy at any time without prior notice. We will post these changes on this page so please review this document each time before you provide us with any personal information. This Policy is effective as of 4/10/2025. Your continued use of the Website after seven (7) days of any changes or revisions to this Privacy Policy shall indicate your agreement with the terms of such revised Privacy Policy. We suggest that you check this Privacy Policy periodically if you are concerned about how your information is used.

Consent

By using our website, you hereby consent to our Privacy Policy and agree to its terms.