



Privacy Policy

January 12, 2021

FACTS	WHAT DOES MBM WEALTH CONSULTANTS, LLC (“MBM”) DO WITH YOUR FINANCIAL INFORMATION?
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Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires MBM to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
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What?	<p>The types of personal information we collect and share depends on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> ▪ Social Security number(s) and employment information ▪ Account or policy numbers and balances ▪ Home address, contact information, and employer information ▪ Information on members of your family ▪ Income and assets ▪ Transaction history and investment experience
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How?	All financial companies need to share customers’ personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers’ personal information; the reasons MBM Wealth Consultants, LLC chooses to share; and whether you can limit this sharing.
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Reasons we can share your personal information	Does MBM Wealth Consultants, LLC share?	Can you limit this sharing?
For our everyday business purposes – such as to process your transactions, maintain your account(s), provide financial planning services, respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes – to offer our products and services to you. We do not sell lists of our clients or their information, nor do we share customer information to marketing companies outside of MBM.	Yes	No
For joint marketing with other financial companies	No	Not Applicable
For our affiliates’ everyday business purposes – Any client information possessed by MBM may be shared, as needed, for insurance product suitability review and illustration development.	Yes, when necessary.	No
<i>The only affiliate of MBM Wealth Consultants, LLC is MBM Insurance Services, LLC, which is under common control. Information is shared when any of MBM’s Supervised Persons, that are also licensed insurance agents with MBM Insurance Services, LLC, are preparing insurance illustrations or applications for consideration by the client.</i>		
For our affiliates to market to you	No	Not Applicable
For nonaffiliates to market to you	No	Not Applicable



Who we are

Who is providing this notice?	MBM Wealth Consultants, LLC
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What we do

How does MBM Wealth Consultants, LLC protect my personal information?

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards, protected file storage, and a secure building. We train our staff on data security and instruct our team to treat your information with care.

How does MBM Wealth Consultants, LLC collect my personal information?

We collect your personal information, for example, when you:

- Open an account
- Seek advice about your investments or financial planning
- Enter an investment advisory or consulting contract
- Tell us about your investment or retirement portfolio or earnings

We also collect your personal information from other companies.

Definitions

Affiliates

Companies related by common ownership and control. They can be financial and nonfinancial companies.

- *MBM does share with its affiliated insurance agency, MBM Insurance Services, LLC.*

Nonaffiliates

Companies not related by common ownership and control. They can be financial or nonfinancial companies.

- *We do not share with nonaffiliates so that they can market to you.*

Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or service to you.

- *We do not jointly market.*

Questions?

Call (636) 274-6262 or go to <https://mbmwealth.com/privacy-policy/>

MBM is an SEC registered investment adviser. Registration does not imply any level of skill or training.

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