Rev. 10/2024

FACTS

WHAT DOES STRATEGIC NAVIGATORS ASSET MANAGEMENT, LLC DBA STRATEGIC NAVIGATORS PRIVATE WEALTH DO WITH YOUR PERSONAL INFORMATION?

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 us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

What?

The types of personal information we collect and share depends on the product or service you have with us. This information can include:

- Tax Identification Number, Date of Birth, Telephone Number and Address
- Annual Income, Tax Bracket, Account Balances and Transaction History
- Net Worth, Assets and Employment History

When you are *no longer* our customer, we continue to share your information as described in this notice

How?

All financial companies need to share clients' personal information to run their everyday business. In the section below, we list the reasons companies can share their clients' personal information; the reasons Strategic Navigators Private Wealth chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information?	Does Strategic Navigators Private Wealth Share?	Can you limit this sharing?
For our everyday business		
purposes - Such as to process		
your transactions, maintain your	Yes	No
account(s), respond to court		
orders and legal investigations,		
or report to credit bureaus		
For our marketing purposes -		
To offer our products and	Yes	No
services to you		
For Joint Marketing with	No	We don't share.
other financial companies		
For our affiliates' everyday		
business purposes -	Yes	No
Information about your		
transactions and experiences		
For our affiliates' everyday		
business purposes-	No	We don't share.
Information about your		
creditworthiness		
For non-affiliates to market to	No	We don't share
you		

Questions?	Call: (616) 369-7774

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Who we are	
Who is providing this notice?	Strategic Navigators Private Wealth

What we do		
How does Strategic Navigators	To protect your personal information from unauthorized access	
Private Wealth <i>Protect</i> my	and use, we use security measures that comply with federal	
personal information	law. These measures include computer safeguards and secured	
	files and buildings.	
How does Strategic Navigators	We collect your personal information, for example, when you	
Private Wealth collect my personal	Provide your personal information	
information?	Seek Investment Advice	
	Complete an Application	
	We also collect your personal information from other, such as	
	credit bureaus, affiliates, or other companies.	
Why can't I limit all sharing?	Federal law gives you the right to limit only	
	Sharing for affiliates' everyday business purposes-	
	information about your creditworthiness	
	Affiliates from using your information to market to you	
	Sharing for non-affiliates to market to you	
	State laws and individual companies may give you additional	
	rights to limit sharing.	

Definitions		
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.	
	• Strategic Navigators Private Wealth does not share with affiliates so they can market to you.	
Non-affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.	
	• Strategic Navigators Private Wealth does not share with non-affiliates so they can market to you.	
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.	
	Strategic Navigators Private Wealth does not jointly market.	

Other important information