



Lewis Financial, LLC
3590 Sacramento Dr., Ste 140, San Luis Obispo, CA 93401
<https://www.lewisfinancialslo.com/>
805.548.0900

At Lewis Financial, LLC we understand the importance of protecting your personal information and are committed to maintaining your privacy. This Privacy Policy outlines how we collect, use, and safeguard your information when you interact with our services, including our website, applications, and any other products or services offered by Lewis Financial. Your privacy is of utmost importance to us, and we strive to ensure that your personal information is handled securely and transparently. We adhere to applicable data protection laws and regulations to safeguard your privacy rights.

Please take a moment to review this Privacy Policy to understand how we collect, use, and protect your information. By accessing or using our services, you consent to the practices described in this Privacy Policy. If you have any questions or concerns regarding our privacy practices or this policy, please don't hesitate to contact us.

Wyatt E. Lewis
Wyatt.Lewis@lpl.com
Office: (805) 548-0900

1. **Information Collection.** We collect personal information for all new, existing, and previous clients necessary for our business operations. This information includes, but is not limited to, social security numbers, income, assets, accounts, and financial experience. When you are no longer a customer, we will continue to hold your information and share it as described herein. All sensitive data will be collected within the confines of regulatory requirements.
2. **Information Use and Sharing.** We collect your personal information to open accounts, access accounts, apply for insurance, and create personalized investment plans. Everyday business operations such as processing transactions, maintaining accounts, and responding to legal requirements constitute the use of your personal information. The firm may share your information with broker-dealer firms to supervise your accounts and ensure regulatory compliance.
3. **Information Protection.** To protect your personal information, Lewis Financial, LLC complies with all state and federal regulations. Risk mitigation measures include computer safeguards, private files, and secure buildings.
4. **Frequently Asked Questions**
 - "Why can I not limit all sharing?" Federal law gives you the right to limit sharing with affiliates for everyday business purposes, marketing with affiliation or not, and information about creditworthiness.
 - "Does Lewis Financial participate in joint marketing?" No, we do not jointly market.
 - "Does Lewis Financial share information with affiliates?" No, we do not.
 - "Does Lewis Financial share information with non-affiliates?" No, we do not share with non-affiliates for marketing purposes.

This Privacy Policy is subject to change, and any updates will be posted on our website. By using our services, you agree to the terms outlined herein.