



Privacy Policy

AMC Wealth Management, LLC recognizes that 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. AMC Wealth Management, LLC will not disclose your personal information to anyone unless it is required by law or at your direction, nor will we sell your personal information. AMC Wealth Management, LLC will provide the privacy statement to all clients annually. We want our clients to understand what information we collect, how we use it, and how we protect it responsibly.

Why We Collect Your Information

Help design and implement the investment and planning related services we provide you and comply with the Federal and State laws and regulations that govern us.

What Information We Collect and Maintain

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 that we generate to service your financial needs; or Information that we may receive from third parties with respect to your financial profile.

What Information We Disclose

We are permitted by law to disclose nonpublic information about you to unaffiliated third parties in certain circumstances. For example, in order to provide investment management services to you, we may disclose your personal information to our clearing firm, Charles Schwab.

“Opting-Out” of Third Party Disclosure: If you do not want your advisor to retain copies of your information, you may contact us by calling (618) 384-9478. Otherwise, AMC Wealth Management, LLC will not disclose any personal information about you or your account(s) unless one of the following conditions is met: we receive your prior written consent; we have documentation that the recipient is your authorized representative; or we are required by law to disclose information to the recipient.

Arrangements with companies not affiliated with AMC Wealth Management, LLC will be subject to confidentiality agreements.

How We Protect Your Personal Information

Privacy has always been important to AMC Wealth Management, LLC. We restrict and limit access to client information only to those who need to carry out their business functions. As such, we only maintain electronic records in cyber secure locations to protect your personal information.

If you have any questions about our Privacy Policy or its contents please contact:

Mr. Adam M. Cross, President & CCO, at (618) 384-9478 or by email: adam@amcwealth.com