



Privacy Policy Statement

	<b>WHAT DOES BAYTRUST WEALTH MANAGEMENT, LLC (BAYTRUST) DO WITH YOUR PERSONAL INFORMATION?</b>	
<b>Why?</b>	Financial companies choose how they share your personal information. Federal law gives you 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. In addition to federal law, certain state laws may provide you with additional rights to limit sharing or request access to your personal information. Please read this notice carefully to understand what we do.	
<b>What?</b>	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> <li>• Social Security Number and Date of Birth</li> <li>• Account Balances and Account Transactions</li> <li>• Investment Experience</li> <li>• Checking Account Information</li> <li>• Income and Retirement Assets</li> <li>• Risk Tolerance</li> <li>• Assets</li> <li>• Wire Transfer Instructions</li> </ul> <p>When you are no longer our customer, we continue to share your information as described in this notice. BayTrust retains personal information only as long as necessary to fulfill legal, regulatory, and business obligations.</p>	
<b>How?</b>	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 BayTrust chooses to share; and whether you can limit this sharing.	
<b>Reasons we can share your personal information for:</b>	<b>Do we share?</b>	<b>Can sharing be limited?</b>
Everyday business purposes such as to process your transactions; open, maintain and close your account(s); respond to court orders and legal investigations; or report to credit bureaus.	Yes	No
Marketing purposes to offer our products and services to you.	No	We do not share
Joint marketing with other financial companies.	No	We do not share
Our affiliates' everyday business purposes. This includes information about your transactions and experiences.	No	We do not share
Non-affiliates to market to you.	No	We do not share
<b>Questions?</b>	Call 813-820-0069 or go to <a href="http://www.baytrust.com">www.baytrust.com</a> 15316 N Florida Ave   Tampa, FL 33613	

<b>Who we are</b>	
Who is providing this notice?	BayTrust Wealth Management
<b>What we do</b>	
How does BayTrust protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. BayTrust protects your personal information using industry-standard safeguards, including encryption, multi-factor authentication, secure data storage, and regular monitoring of vendor practices.
Why can't I limit all sharing?	Federal law gives you the right to limit only: <ul style="list-style-type: none"> <li>• Sharing for affiliates' everyday business purposes— information about your creditworthiness</li> <li>• Affiliates from using your information to market to you</li> <li>• Sharing for non-affiliates to market to you State laws and individual companies may give you additional rights to limit sharing.</li> </ul>
<b>Definitions</b>	
Affiliates	Companies related by common ownership or control. They can be financial and non-financial companies.
Non-affiliates	Companies not related by common ownership or control. They can be financial and non-financial companies.
Joint marketing	A formal agreement between non-affiliated companies that together market financial products or services to you.