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Privacy Policy

BELLE TRACE LLC is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us.

The categories of nonpublic information the Firm collects from prospects and Clients may include information about personal finances, information about health to the extent that it is needed for the financial planning process, information about transactions with third parties, and information from consumer reporting agencies, e.g., credit reports. The Firm uses this information to help Clients meet their personal financial goals.

With Client permission, the Firm discloses limited information to attorneys, accountants, and mortgage lenders with whom the Client has established a relationship. Clients may opt out from our sharing information with these nonaffiliated third parties by notifying us at any time by telephone, mail, fax, email, or in person. With Client permission, the Firm shares a limited amount of information about the Client with your brokerage Firm in order to execute securities transactions on the Client's behalf.

The Firm does not provide Client personal information to mailing list vendors or solicitors. No mobile information will be shared with third parties/affiliates for marketing/promotional purposes. All other categories exclude text messaging originator opt-in data and consent; this information will not be shared with any third parties.

Federal and State Securities Regulators may review the Firm's Company records and Client's personal records as permitted by law. Personally identifiable information about Clients will be maintained while Firm agreements are active, and for the required period thereafter that records are required to be maintained by federal and state securities laws. After that time, information may be destroyed.

We will notify you in advance if our privacy policy is expected to change. The Firm is required by law to deliver this Privacy Notice to Clients annually, in writing.