

Privacy Policy

In November of 1999, Congress enacted the Gramm-Leach-Bliley Act (GLBA). The GLBA requires certain financial institutions, such as investment adviser firms, to protect the privacy of customer information. In situations where a financial institution does disclose customer information to non-affiliated third parties, other than permitted or required by law, customers must be given the opportunity to opt out or prevent such disclosure. Wealth Advisors Network, Inc. does not share or disclose customer information to non-affiliated third parties except as permitted or required by law.

Wealth Advisors Network, Inc. (“WAN”) d/b/a Contryman Wealth Advisors (“CWA”) and Contryman Associates, P. C. (“CAPC”) are separate and distinct legal entities. CAPC is a professional corporation and licensed as a Certified Public Accounting Firm. CWA is engaged in the business of an investment adviser. CWA is wholly owned by CAPC. Wealth Advisors Network is not licensed as a Certified Public Accounting firm. CWA is committed to safeguarding the confidential information of its clients. CWA holds all personal information provided by clients in the strictest confidence and it is the objective of CWA to protect the privacy of all clients. Except as permitted or required by law, CWA does not share confidential information about clients with non-affiliated parties. In the event that there were to be a change in this policy, CWA will provide clients with written notice and clients will be provided an opportunity to direct CWA as to whether such disclosure is permissible.

To conduct regular business, CWA may collect personal information from sources such as:

- Information reported by the client on applications or other forms the client provides to CWA
- Information about the client’s transactions implemented by CWA or others
- Information developed as part of financial plans, analyses or investment advisory services

To administer, manage, service and provide related services for client accounts, it is necessary for CWA to provide access to customer information within the firm and to non-affiliated companies with whom CWA has entered into agreements. To provide the utmost service, CWA may disclose the information below regarding customers and former customers, as necessary, to companies to perform certain services on CWA’s behalf.

- Information CWA receives from the client on applications (name, Social Security number, address, assets, etc.)
- Information about the client’s transactions with CWA or others (account information, payment history, parties to transactions, etc.)
- Information concerning investment advisory account transactions
- Information about a client’s financial products and services transaction with CWA

Since CWA shares non-public information solely to service client accounts, CWA does not disclose any non-public personal information about CWA’s customers or former customers to anyone, except as permitted by law. However, CWA may also provide customer information outside of the firm as required by law, such as to government entities, consumer reporting agencies or other third parties in response to subpoenas. In the event that CWA has a change to its customer privacy policy that would allow it to disclose non-public information not covered under applicable law, CWA will allow its clients the opportunity to opt out of such disclosure.