

PRIVACY DISCLOSURE DOCUMENT

Citrin Cooperman Wealth Management, LP
1800 JFK Blvd.
20th Floor
Philadelphia, PA 19103

Citrin Cooperman Wealth Management, LP's primary client goal is to protect your privacy.

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

- Information reported by you on applications or other forms you provide to us

However, the Firm does not share or disclose any nonpublic personal information about its current or former customers, except as permitted by law. All information will remain confidential.

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Information Safeguarding

Citrin Cooperman Wealth Management, LP will internally safeguard your nonpublic personal information by restricting access to only those employees who provide products or services to you or those who need access to your information to service your account. In addition, we will maintain physical, electronic and procedural safeguards that meet federal and/or state standards to guard your nonpublic personal information.
