

# **CORNERSTONE WEALTH MANAGEMENT**

**27366 Center Ridge Road  
Westlake, Ohio 44145**

## **PRIVACY POLICY**

Cornerstone Wealth Management (“Cornerstone”) is committed to client confidentiality and the protection of your privacy. The following information is provided, as required by law, to help you understand our privacy policy and how we will handle and maintain confidential personal information as we fulfill our obligations to protect your privacy. “Personal information” refers to your personal identifying information and the non-public financial information obtained by Cornerstone in connection with carrying out our services.

### ***~ Information We Collect ~***

Cornerstone Wealth Management collects personal information as part of our relationship with you, to provide client services and fulfill legal and regulatory requirements. The type of information we collect may include:

- a. Information Cornerstone receives from you on forms (such as name, address, Social Security number, profile documents, assets and income);
- b. Information you provide Cornerstone directly about your personal finances or personal circumstances or which we may receive from brokerage statements or other information you authorize Cornerstone to receive.

### ***~ Information Disclosed in Administering Services ~***

All financial companies need to share customers’ non-public personal information to run their everyday business. We use various programs on our computer systems in which confidential information may be available to the providers of such systems. Examples include our client information and financial planning systems, both of which are cloud-based. We believe the providers of these systems take reasonable precautions to secure the confidentiality of client data.

We share your non-public personal information for our everyday business purposes such as to process your transactions, maintain your account(s), to develop your investment or financial plan, respond to court orders and legal investigations, or as required by law.

### ***~ Procedures to Protect Confidentiality and Security of Your Personal Information ~***

Cornerstone has procedures in place that limit access to personal information to those employees who need to know such information in order to perform business services. In addition, Cornerstone maintains physical, electronic, and procedural safeguards to protect your non-public personal information.

Cornerstone will update its policies and procedures when necessary to ensure that your privacy is maintained and that Cornerstone conducts business in a way that fulfills our commitment to you. If we modify this privacy policy, we will notify then-current clients. If you have questions, please call us at 440.899.4000 or visit our website at [www.cornerstonewealthmgmt.com](http://www.cornerstonewealthmgmt.com).

January 2026