HERITAGE WEALTH ADVISORS
PRIVACY NOTICE

Heritage Wealth Advisors values your privacy. We are committed to safeguarding the nonpublic personal information (NPI) of our clients and former clients, as required under the Securities and Exchange Commission's Regulation S-P. This notice describes the types of information we collect, how we use it, and the steps we take to protect it.

Information We Collect We collect NPI about you to provide advisory services. This information may include name, address, email, social security number or tax identification number, date of birth, employment information, financial account numbers and holdings, tax filings and supporting information, investment objectives, and financial situation.

How We Use Your Information We use your NPI to: Provide investment advisory services; Maintain and service your account(s); Comply with legal and regulatory obligations; and communicate with you regarding your account or services.

Information We Share We do not disclose your NPI to non-affiliated third parties, except as permitted or required by law, or as necessary to provide services to you. We may disclose client information to certain non-affiliated third parties such as but not limited to custodians, brokers, or administrators that support your account, regulatory authorities such as the SEC, as well as attorneys and auditors, if necessary to support our services. We do not share information with anyone for marketing purposes.

Safeguarding Your Information We maintain physical, electronic, and procedural safeguards designed to protect your NPI. Access to your information is limited to personnel who need it to perform their job functions.

Your Rights and Choices You are not required to take any action in response to this notice. If our privacy practices materially change in the future, we will provide you with a revised notice and the opportunity to opt out of certain information sharing, if applicable.

Contact Us If you have any questions about our privacy policy, please contact Tina Leiter, Chief Compliance Officer at tleiter@heritagewealth.net.