Privacy Statement

Abacus Wealth Partners, LLC (the “Company”) adopts the following privacy policy and procedures in order to safeguard the personal information of its consumers and customers in accordance with SEC Regulation S-P, 17 CFR 248.30.

We collect nonpublic personal information about you from the following sources:

- Information we receive from you on applications and forms
- Information we receive from you through verbal, written, and electronic communications
- Information we receive from other professionals who provide services to you such as accountants and attorneys
- Information about your transactions and account balances through us or others
- Information we receive from a consumer reporting agency

All client information collected is kept confidential and accessed by employees needing information to service clients. Information collected is shared only with nonaffiliated third parties in conjunction with services to the clients’ accounts and representatives as directed by the client. These include representatives of custodians, brokerage firms, private investment sponsors, and outside consultants retained by the Company, as well as attorneys and accountants identified by the client.

We do not sell, share, or disclose your nonpublic personal information to unaffiliated third-party marketing companies.

We employ physical, electronic and procedural safeguards to guard your nonpublic personal information.

If you decide to close your account(s) or become an inactive customer, we will adhere to the privacy policies and practices as described in this notice to ensure that we comply with our own policy, industry practices, and federal and state regulations. And we train our employees in the proper handling of sensitive information.