

MDX Wealth Management Privacy Policy

MDX Wealth Management appreciates the privacy concerns and expectations of our customers. We are committed to maintaining a high level of privacy and confidentiality when it comes to your personal information. We use that information only when permitted by law and to provide services to you. We provide this privacy notice to you so that you may understand our policies with regard to the collection and disclosure of non-public personal information pertaining to you. We never sell your information to any outside parties.

Why?	The firm gathers information about you and your accounts so that we can (i) know who you are so we can effectively prevent unauthorized access to your information (ii) design and improve the products and services we offer (iii) as part of the patriot acts efforts to combat terrorism and other illegal activities, we gather information of a personal nature from you to verify your identity. We are required by federal law to collect this information and verify your identity in order to do business with you.
What?	Types of personal information we collect and share include: <ul style="list-style-type: none"> • Social Security and financial account numbers • Income and employment information • Account balances, transactions and financial information
How?	What sources we use to obtain your information? <ul style="list-style-type: none"> • Information we receive from you on applications and other forms; and • Information about your transactions with us and others

Reasons we can share your personal information	Does MDX Wealth Share?	Can you limit this sharing?
For our everyday business purposes- such as to process your transaction(s), respond to regulators performing routine audits, or otherwise required by law	Yes	No
For our nonaffiliates everyday business purposes- such as to process your transaction(s), respond to regulators performing routine audits, or otherwise required by law.	Yes	No
For marketing purposes- the firm can send you information about our products but we don't sell your information.	No	We don't share
For nonaffiliates to market to you- by this we mean the custodian(s) and product providers. Each of these have their own policies procedures and ability to opt out of marketing efforts. Please see their privacy policy for details.	Yes	Yes

Confidentiality & Security- We maintain physical, electronic and procedural safeguards to protect your personal information and financial data. We restrict access to your information to authorized persons who have a need for these records. Companies we hire are contractually obligated to maintain confidentiality. We will continue to follow these policies even after your account is closed or becomes inactive.

Questions: Contact MDX Wealth at 713-877-2526 M-F 9-4 cst or email us at nicole@mdxwealth.com
Contact your custodian:
TD Ameritrade: 1-888-354-8361 or www.tdainstitutinal.com
Interactive Brokers: 1-866-694-2757 or www.interactivebrokers.com