Privacy Policy

HERITAGE WEALTH ADVISORS' PRIVACY NOTICE

This notice is being provided to you in accordance with the Securities and Exchange Commission's rule regarding the privacy of consumer financial information ("Regulation S-P"). Please take the time to read and understand the privacy policies and procedures that we have implemented to safeguard your non-public personally identifiable information ("PII").

Information We Collect and How We Collect It

Heritage Wealth Advisors must collect certain personally identifiable financial information about its Clients to provide financial services and products. The personally identifiable financial information that we collect and share during the normal course of doing business with you may include but is not limited to:

- Social security number, date of birth, and employment information;
- Assets and income and financial statements;
- Tax filings and supporting documentation;
- Account information including account numbers, balances and transaction history.

We collect this information through a variety of ways which may include:

- Information you provide us on applications, reports, tax filings, W-2s, or other documentation;
- Information about your transactions with us, our affiliates, or others;
- Information we receive from a consumer reporting agency.

Information We Disclose

We do not disclose any non-public personal information about our Clients or former Clients to anyone, except as permitted or required by law, or as necessary to provide services to you. In accordance with Sections 248.13 through 248.15 of Regulation S-P, we may disclose all of the information we collect, as described above, to certain non-affiliated third parties such as but not limited to, attorneys, accountants, auditors and persons or entities that are assessing our compliance with industry standards. We enter into contractual agreements with all nonaffiliated third parties that prohibit such third parties from disclosing or using the information other than to carry out the purposes for which we disclose the information.

Confidentiality and Security

We restrict access to non-public personal information about you to those Employees who need to know that in-formation to provide financial products or services to you. We maintain physical, electronic, and procedural safe-guards that comply with federal standards to guard your nonpublic personal information.

Additional Information

For additional information on Heritage Wealth Advisors' privacy policy or to receive a copy of the firm's ADV, please contact Jay Jordan, Chief Compliance Officer, at 804.643.4080 or by email at jjordan@heritagewealth.net.