



Website Privacy Statement
Straight Path Wealth Management
7699 Georgetown Center Dr. Jenison, MI 49428
Effective Date: March 2025

Straight Path Wealth Management respects your privacy. This Privacy Policy explains how we collect, use, disclose, and safeguard your information when you visit our websites—straightpathwealth.com, straightpathtax.com, and straightpathadvisors.com—including any related services such as appointment booking and analytics tracking. By using our website, you consent to the practices described in this policy.

Information We Collect

When you interact with our website, we may collect both personal and non-personal information to improve our services and enhance your experience. This information is collected in the following ways:

Personal Information You Provide to Us

When you fill out forms, request consultations, or schedule appointments via **YouCanBookMe**, we collect certain personal details. This may include:

- Your name
- Email address
- Phone number
- Any additional information you voluntarily submit through our website

Automatically Collected Information

To help us better understand how visitors use our website, we use **Wix Analytics** to automatically gather certain information about your browsing behavior. This may include:

- Your IP address
- The type and version of your web browser
- Pages you visit and the duration of your visit
- Referral sources that led you to our website

Cookies and Tracking Technologies

Our website uses cookies and similar tracking technologies to enhance user experience, collect analytics, and improve website performance. Cookies help us recognize returning visitors, remember preferences, and analyze site traffic. You have the option to adjust your cookie settings within your browser.

Third-Party Links

Our website may contain links to third-party websites. We are not responsible for the privacy practices or content of these external sites. We encourage users to review the privacy policies of any third-party websites they visit.

Children's Privacy

Our website is not intended for individuals under the age of 13. We do not knowingly collect personal information from children. If we discover that a child under 13 has provided us with personal information, we will take steps to delete such information.

Data Retention Policy

We retain personal data only as long as necessary for the purposes outlined in this Privacy Policy, unless a longer retention period is required by law. Users may request deletion of their personal data by contacting us.

How We Use Your Information

The information we collect is used for various purposes, including but not limited to:

- Scheduling and managing appointments through **YouCanBookMe**
- Responding to inquiries and providing financial planning services
- Enhancing website functionality and optimizing user experience
- Sending relevant communications, provided you have opted in
- Ensuring compliance with legal obligations and protecting the security of our website

Data Sharing and Third-Party Services

We do not sell, rent, or trade personal information. However, we do work with trusted third-party services that help facilitate website operations and services. These include:

- **YouCanBookMe** (appointment scheduling platform)
- **Wix Analytics** (website usage tracking and performance monitoring)

These third-party providers have their own privacy policies and data security measures in place. We encourage users to review these policies for additional details on how their information is handled.

Data Security and Storage

Straight Path Wealth Management takes reasonable measures to protect personal information from unauthorized access, alteration, disclosure, or destruction. However, no method of transmission over the Internet is 100% secure. While we strive to use commercially acceptable means to protect your data, we cannot guarantee absolute security.

Client data is securely stored using **Google Sheets**, with access restricted to authorized personnel. We implement security measures such as password protection, encryption, and access controls to safeguard this information. Additionally, if you have opted in to receive communications, your contact details may be stored within **Levitate**, our secure email outreach platform. We do not share or sell your data and take reasonable precautions to protect it from unauthorized access.

Your Rights and Choices

We respect your rights regarding your personal data. You have the right to:

- Request access to the personal information we have collected about you
- Request corrections or deletions of your data where applicable
- Opt out of receiving marketing communications
- Disable cookies by adjusting your browser settings

This Privacy Policy may be updated periodically to reflect changes in our practices, technology, or legal requirements. Any modifications will be posted on our website, and we encourage you to review this policy regularly.

If you have any questions about our privacy statement, you can contact us at 616-457-5450 or in writing at 7699 Georgetown Center Dr, Jenison, MI 49428.