

Parcion Private Wealth is committed to protecting the confidentiality of your personal information. Here is a description of how we protect your information, how we use the information and the circumstances in which we would need to disclose information to others.

Cookie Policy

We use cookies on our website and as part of our marketing efforts. Cookies help us and our third-party partners to collect information about you and other visitors to our website, including date and time of visit, pages viewed, amount of time spent on our sites.

In addition to cookies, Parcion also collects information from your device or web browser, including your IP addresses, referrer headers, data identifying your web browser and version, social media pixels, web beacons and tags. Third parties may also collect information through our website through cookies, third party plug-ins and widgets. These third parties collect data directly from your web browser and may connect it to personally identifiable information. The processing of this data is subject to the privacy policies of these third-party vendors.

We use cookies and pixel tags to track usage of our website to provide services to existing and prospective clients and improve their online experience. We also use cookies and pixel tags to obtain aggregate data about site traffic and site interaction, to identify trends and obtain statistics so that we can improve our site.

Additionally, we may use cookies and pixel tags for marketing and advertising purposes. Advertising cookies (of third parties) collect information to help better tailor advertising to your interests, both within and beyond our website. In some cases, these cookies involve the processing of your personal data.

You can use your browser settings can help you manage cookies. Some internet browsers also have “Do Not Track” features, but due to a lack of a universal protocol for websites to interpret and respond to DNT Signals, these options may not work, and we cannot guarantee that all first-party or third-data collection can be prevented using this method.

Strict Security Measures

We take the security of your personal information very seriously and use physical, electronic and procedural safeguards that comply with applicable laws to protect your personal information.

We do not share any personal information about our clients or former clients with anyone outside Parcion Private Wealth without your direction or approval, except as described below. We require that when we share information within the scope of this agreement, those with whom we share such information keep that information strictly confidential, except where disclosure is permitted or required by law.

Those instances include:

- Disclosures to companies that perform services on our behalf to assist us in providing our services to you, including our technology partners.

- Disclosures to companies necessary for us to manage and administer your account (such as providing account information to brokers and custodians).
- Disclosures that we have determined to be permitted or required by law, such as in response to a subpoena or other required legal process.

In every case, disclosures are limited to the data determined to be necessary under the particular circumstances. We have not and will not sell any personal information about our clients or former clients.