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Privacy Policy

Olympic Wealth Management (also referred to as “Advisor”), like other firms which advise individual investors on personal financial matters, is required by federal law to inform its clients of policies regarding the privacy of non-public information.

In the course of providing its clients with certain advice, Advisor may receive non-public personal financial information from its clients, their accountants, attorneys, and other representatives including but not limited to financial statements, tax returns and other personal information. All nonpublic personal information received by Olympic Wealth Management regarding its clients or former clients is held in strict confidence in accordance with the firm's professional obligations, and shall not be released to people outside Advisor, except by client consent or as required by law or to explain Advisor's actions to professional organizations that it may be a member of.

Advisor may share certain information with third parties who assist it in providing services to clients (such as administrative and client service functions) or marketing services, as permitted by law, subject to the obligation of these third parties not to use or disclose such information for any other purpose.

Olympic Wealth Management retains records relating to the professional services it provides in assisting clients with their needs. In some cases, records shall also be retained to comply with regulatory or professional guidelines. In order to protect your non-public personal information from unauthorized disclosure, Advisor maintains physical, electronic and procedural safeguards.

Clients are asked to contact the staff at Olympic Wealth Management immediately at (425) 485-4700 if their financial situation, goals, or risk tolerance changes.

