Impactful Wealth Solutions

Website Privacy Policy

Last Updated: June 19, 2026

1. Introduction

Impactful Business Solutions d/b/a Impactful Wealth Solutions ("Impactful Wealth Solutions," "we," "our," or "us") respects your privacy and is committed to protecting the personal information you share with us. This Website Privacy Policy explains how we collect, use, disclose, safeguard, and retain information when you visit www.impactfulwealthsolutions.com, submit information through our website, schedule a consultation, download resources, purchase or access educational materials, register for events or webinars, communicate with us, or engage with our services.

Impactful Wealth Solutions provides wealth strategy, investment advisory services, insurance planning, retirement planning, tax planning and preparation, business financial guidance, cash flow education, and related educational resources. Impactful Business Solutions d/b/a Impactful Wealth Solutions is registered as an investment adviser in the State of Texas. Registration does not imply any particular level of skill or training.

This policy applies to website visitors, prospects, clients, subscribers, and users of our online resources. Certain advisory clients may also receive separate privacy notices, Form ADV disclosures, advisory agreements, custodial disclosures, or other required documents that provide additional information about our practices.

2. Information We Collect

We may collect information directly from you, automatically through our website and related technology, and from third-party service providers that help us operate our business. The information we collect depends on how you interact with us.

Personal and contact information may include your name, email address, phone number, mailing address, business name, job title, preferred contact method, and information submitted through contact forms, scheduling forms, webinar registrations, intake forms, questionnaires, surveys, or email communications.

Financial and advisory information may include information you provide to receive financial guidance or services, including income, expenses, assets, liabilities, investment accounts, retirement accounts, insurance coverage, tax information, estate planning details, business revenue, business expenses, goals, risk tolerance, financial priorities, and related documents.

Tax preparation and planning information may include Social Security numbers, taxpayer identification numbers, filing status, dependents, income documents, deductions, credits, banking information for tax payment or refund purposes, prior-year returns, business records, and other tax-related information necessary to provide tax services.

Insurance-related information may include information needed to evaluate or support insurance planning, quotes, applications, underwriting, policy reviews, beneficiary planning, or coverage recommendations. This may include age, household information, income, health-related underwriting information you choose to provide to an insurance carrier or licensed professional, policy details, and beneficiary information.

Investment account and custodian information may include information related to accounts held with third-party custodians or platforms, including account type, account balance, transactions, holdings, risk profile, investment objectives, and account documentation.

Business and practice management information may include business entity details, revenue, cash flow, expenses, bookkeeping information, payroll information, retirement plan information, employee benefits information, and other information needed to support business owners and employer-sponsored benefit or retirement planning conversations.

Website, device, and analytics information may include IP address, browser type, device type, operating system, pages viewed, links clicked, referral sources, time spent on pages, conversion events, form activity, cookies, pixels, and similar analytics data.

3. How We Use Your Information

We use information to provide, operate, improve, and personalize our website, services, communications, and client experience. This may include responding to inquiries, scheduling consultations, onboarding clients, preparing financial or tax analyses, providing investment advisory services, evaluating insurance needs, delivering educational resources, managing events and webinars, processing transactions, maintaining records, and supporting client service.

We may also use information to communicate with you about appointments, client service matters, deadlines, account or planning updates, educational content, newsletters, webinars, events, offers, practice updates, and other information that may be relevant to your relationship with us.

We may use website and analytics information to understand how visitors use our website, improve content and user experience, measure marketing effectiveness, manage advertising or retargeting campaigns, troubleshoot technical issues, protect against fraud or unauthorized activity, and comply with legal, regulatory, contractual, and compliance obligations.

4. How We Share Information

We do not sell your nonpublic personal information. We do not disclose nonpublic personal information except as permitted or required by law, as needed to provide services, as authorized by you, or as described in this policy.

We may share information with service providers and vendors that help us operate our website and business, including customer relationship management platforms, email and SMS providers, scheduling tools, website hosting providers, payment processors, document storage providers, e-signature platforms, tax software providers, financial planning software providers, portfolio management or reporting tools, compliance support providers, cybersecurity providers, marketing platforms, webinar platforms, and other administrative or technology vendors.

We may share information with custodians, broker-dealers, investment platforms, insurance carriers, product sponsors, tax professionals, attorneys, accountants, consultants, payroll providers, bookkeepers, or other professionals when necessary to provide services, support client requests, implement recommendations, or coordinate work on your behalf.

We may disclose information to regulators, courts, law enforcement, government agencies, or other parties when required by law, subpoena, regulatory examination, court order, tax reporting requirement, audit, or other legal or compliance obligation.

We may share information in connection with a business transaction, such as a merger, acquisition, succession plan, restructuring, sale of assets, or transfer of part or all of our business, subject to appropriate confidentiality and legal protections.

5. Nonpublic Personal Information and RIA Client Privacy

As an investment adviser, we may collect nonpublic personal information about clients in connection with advisory services. Nonpublic personal information may include information provided on applications, agreements, questionnaires, financial planning documents, tax documents, account forms, statements, reports, and other client communications.

We restrict access to nonpublic personal information to personnel, representatives, service providers, and professionals who need the information to provide services, support our operations, or comply with legal and regulatory obligations. We maintain policies and procedures designed to protect client information and to limit disclosures to those permitted by law.

Current and former advisory clients are protected under our confidentiality practices. We do not disclose nonpublic personal information about former clients except as permitted or required by law or as authorized by the client.

6. Cookies, Tracking Technologies, Advertising, and Analytics

Our website may use cookies, pixels, tags, scripts, analytics tools, and similar technologies to operate the website, remember preferences, measure website performance, understand visitor behavior, manage marketing campaigns, and improve user experience.

You may be able to adjust your browser settings to refuse cookies or alert you when cookies are being used. Disabling cookies may affect certain website features. If we use third-party analytics or advertising tools, those providers may collect information according to their own privacy policies.

7. Email, Text Messages, and Marketing Communications

If you provide your contact information, we may send you service-related communications, appointment reminders, educational content, newsletters, webinar invitations, event updates, marketing messages, or other communications related to our services and resources.

You may unsubscribe from promotional emails using the unsubscribe link included in the email or by contacting us. If you opt out of promotional communications, we may still send administrative, transactional, compliance, or client-service messages. If we send text messages, you may opt out by replying STOP or following the instructions provided in the message.

8. How We Protect Information

We use administrative, technical, and physical safeguards designed to protect personal information from unauthorized access, use, disclosure, alteration, or destruction. These safeguards may include access controls, password protection, encrypted systems where appropriate, secure document storage, cybersecurity tools, vendor oversight, internal procedures, and limited access to sensitive information.

No website, email system, cloud platform, or electronic transmission is completely secure. Please use caution when sending sensitive information by email or through online forms. If you need to send highly sensitive documents, we may provide a secure portal, encrypted method, or other protected delivery option.

9. Data Retention

We retain information for as long as reasonably necessary to provide services, maintain client records, comply with securities, tax, insurance, accounting, legal, and regulatory requirements, resolve disputes, enforce agreements, support business operations, and meet recordkeeping obligations. Retention periods may vary depending on the type of information and the nature of our relationship with you.

10. Your Choices and Rights

You may request to access, correct, update, or delete certain personal information by contacting us. We will review and respond to requests in accordance with applicable law and our legal, regulatory, and recordkeeping obligations.

You may opt out of promotional emails and certain marketing communications. You may also manage cookies through your browser or device settings. In some cases, we may be required to retain information even if you request deletion, including information needed for regulatory, tax, legal, compliance, fraud prevention, or recordkeeping purposes.

11. Children's Privacy

Our website and services are intended for adults and are not directed to children under 13. We do not knowingly collect personal information from children under 13. If we learn that we have collected such information, we will take reasonable steps to delete it unless retention is required by law.

12. Third-Party Websites and Platforms

Our website may contain links to third-party websites, platforms, tools, social media pages, payment processors, scheduling tools, webinar platforms, custodians, insurance carriers, or other resources. We are not responsible for the privacy practices, security, or content of third-party websites or platforms. Please review their privacy policies before providing information.

13. Educational Content, Book, Courses, and Digital Resources

We may collect information when you download resources, purchase or access a book, workbook, course, webinar, template, newsletter, or other educational material. Educational content is provided for informational purposes and is not individualized investment, tax, legal, insurance, or financial advice unless provided through a separate written client engagement.

14. Investment, Tax, Insurance, and Legal Disclosures

Investment advisory services are offered through Impactful Business Solutions d/b/a Impactful Wealth Solutions, a Texas-registered investment adviser. Registration as an investment adviser does not imply a certain level of skill or training.

Insurance products and services may be offered through appropriately licensed insurance professionals. Tax preparation and tax planning services may be offered separately from investment advisory services. We do not provide legal advice. Estate planning discussions are educational and strategic in nature and should be coordinated with a qualified attorney.

Nothing on our website should be interpreted as a guarantee of investment performance, tax savings, insurance approval, business revenue growth, or any financial outcome.

15. Changes to This Privacy Policy

We may update this Privacy Policy from time to time to reflect changes in our practices, technology, services, regulatory requirements, or legal obligations. The updated policy will be posted on our website with a revised "Last Updated" date. Your continued use of our website after changes are posted means you acknowledge the updated policy.

16. Contact Us

If you have questions about this Privacy Policy, our privacy practices, or your personal information, please contact us:

Impactful Business Solutions d/b/a Impactful Wealth Solutions
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