

Last Updated: September 2026

Stonebridge Wealth Systems LLC (“Stonebridge,” “we,” “us,” or “our”) respects your privacy and is committed to protecting the personal information entrusted to us.

This Website Privacy Policy explains how we may collect, use, disclose, and protect information obtained through **stonebridgeiwm.com** and other websites, online forms, digital communications, and services operated on behalf of Stonebridge.

This Website Privacy Policy supplements the privacy notices Stonebridge provides to its clients pursuant to applicable federal privacy laws. Clients of Stonebridge may receive additional privacy notices describing our practices concerning nonpublic personal information.

1. Information We May Collect

We may collect personal information that you voluntarily provide to us, including when you:

- Complete a website form;
- Request information from Stonebridge;
- Register for an event, seminar, workshop, webinar, or educational program;
- Request an appointment or consultation;
- Complete an online questionnaire, assessment, calculator, or similar tool;
- Subscribe to communications;
- Communicate with us by telephone, email, text message, or other electronic means; or
- Become a client or otherwise establish a relationship with Stonebridge.

Depending upon your interaction with us, information collected may include your name, address, email address, telephone number, communication preferences, appointment information, and other information you choose to provide.

For clients and prospective clients, we may also collect financial and other personal information necessary to provide or evaluate financial planning, investment advisory, and related services. This information may include Social Security numbers, income, account information, account balances, and other financial information.

Our client Privacy Notice provides additional information regarding Stonebridge's collection, use, sharing, and protection of nonpublic personal information.

2. Information Collected Automatically

When you visit our website, certain information may be collected automatically through cookies, pixels, analytics technologies, server logs, and similar technologies.

This information may include:

- Internet Protocol (IP) address;
- Browser and device information;
- Operating system;
- Pages visited;
- Referring website or source;
- Date and time of visits;
- Website interactions; and
- Other information concerning use of our website.

We may use this information to operate and improve our website, understand website usage, evaluate marketing effectiveness, maintain security, and improve our communications and services.

Your browser may allow you to block or limit cookies. Doing so may affect the functionality of certain portions of the website.

3. How We May Use Information

Stonebridge may use information collected through our website and other communications to:

- Respond to questions and requests;
- Schedule appointments;
- Provide requested information or services;
- Communicate with clients and prospective clients;
- Administer registrations for events and educational programs;
- Provide financial planning and investment advisory services;
- Maintain and improve our website and technology;
- Understand the effectiveness of our communications and marketing;
- Maintain business records;
- Detect, prevent, and respond to security concerns;
- Comply with regulatory, legal, and recordkeeping requirements; and
- Conduct other legitimate business activities consistent with our relationship with you.

4. How We May Share Information

Stonebridge may disclose personal information when necessary to operate our business, provide services, comply with legal or regulatory obligations, or as otherwise permitted by law.

This may include disclosures to service providers that assist us with functions such as website hosting, information technology, customer relationship management, communications, scheduling, data processing, cybersecurity, recordkeeping, professional services, and other business operations.

We may also disclose information when required or permitted by law, including in response to court orders, regulatory inquiries, examinations, legal proceedings, or other lawful requests.

Our practices concerning the sharing of nonpublic personal information relating to clients are further described in our client Privacy Notice.

Stonebridge does not share non-public personal information with non-affiliated third parties for those third parties to market their products or services to you, as described in our client Privacy Notice.

5. Text Messaging and Mobile Information

If you provide your mobile telephone number and consent to receive text messages from Stonebridge, we may use your number to communicate with you consistently with your consent.

Mobile information will not be shared with third parties or affiliates for marketing or promotional purposes. Text messaging originator opt-in data and consent will not be shared with third parties, except as necessary to provide messaging services or as otherwise required or permitted by law.

Consent to receive text messages is not a condition of purchasing or receiving Stonebridge's services.

Message frequency may vary. Message and data rates may apply.

You may opt out of receiving text messages at any time by replying **STOP** to a message. You may reply with **HELP** for assistance.

Opting out of text messages does not prevent Stonebridge from communicating with you through other methods when appropriate.

6. Email Communications

If you provide your email address, Stonebridge may use it to respond to inquiries, provide requested information, communicate regarding our relationship with you, or send other communications consistent with applicable law and your communication preferences.

Where applicable, marketing emails will provide a method for unsubscribing from future marketing communications.

7. Information Security

Stonebridge maintains safeguards designed to protect personal information from unauthorized access and use.

Our existing client Privacy Notice states that Stonebridge uses security measures that comply with federal law, including computer safeguards and secured files and buildings.

Although Stonebridge takes reasonable measures to protect information, no method of electronic transmission or storage can be guaranteed to be completely secure.

8. Third-Party Service Providers and Websites

Stonebridge may use third-party technology and service providers to support our website and business operations.

Our website may also contain links to websites or services operated by third parties. Stonebridge does not control the privacy or security practices of third-party websites, and this Website Privacy Policy does not apply to websites or services that Stonebridge does not operate or control.

We encourage you to review the privacy policies of third-party websites before providing personal information to them.

9. Children's Privacy

Stonebridge's website and services are not directed at children under the age of 13, and we do not knowingly use our website to solicit personal information from children under 13.

If we learn that personal information from a child under 13 has been submitted through our website without appropriate authorization, we will take reasonable steps to address the information as required by applicable law.

10. Privacy Rights and Choices

Depending upon your relationship with Stonebridge and applicable law, you may have certain rights regarding how your personal information is used or shared.

Stonebridge's client Privacy Notice describes the circumstances under which clients may limit certain sharing of their personal information.

Stonebridge's current Privacy Notice provides clients with a method to limit certain sharing and directs privacy questions to **308-698-0144**.

11. Changes to This Privacy Policy

Stonebridge may update this Website Privacy Policy periodically to reflect changes in our practices, technology, services, or applicable legal and regulatory requirements.

When changes are made, the “Last Updated” date at the top of this page will be revised. We encourage visitors to review this policy periodically.

12. Contact Us

If you have questions about this Website Privacy Policy or Stonebridge's privacy practices, please contact us:

Stonebridge Wealth Systems LLC

108 1st Avenue Place

Kearney, NE 68847

Phone: 308-698-0144

Website: stonebridgeiwm.com