Privacy Policy

Palisade Wealth Management recognizes the importance of protecting the non-public personal information of our clients and is committed to maintaining the privacy and confidentiality of such information.

Due to the nature of our business we may collect and store personal information about our clients. Such information may involve a client's past and present financial situation and outlook; a client's securities positions, account balances, and any transactions effected; assets; income; tax returns or other tax information; name; address; social security number; other identifying details; occupation; and account or other financial statements.

We do not sell any personal information that we collect from clients. Any personal information that we collect is used exclusively to provide our clients the products and services that they request and to fulfill legal and regulatory requirements. We may share personal information with affiliated and unaffiliated third parties as necessary to provide services to or for Palisade Wealth Management, including third parties that assist us in servicing client accounts. We may disclose personal information in certain circumstances where we believe disclosure is required under law, to cooperate with regulators or law enforcement authorities, and to protect our rights or property. We may share personal information with the designated agents of clients or as otherwise authorized by clients.