

Terms and Conditions

We appreciate your interest in SlateStone Wealth, LLC.

SlateStone Wealth, LLC ("SlateStone") is an SEC registered investment advisor headquartered in Jupiter, Florida. Reference to SlateStone as a "Registered investment adviser" or reference to "registered" does not imply a certain level of skill or training. SlateStone and its representatives maintain compliance with the current filing and disclosure requirements as imposed on the firm and in the states in which its clients reside. For additional information about SlateStone, please visit the SEC Website at adviserinfo.sec.gov and reference CRD #286669. For a copy of the firm's ADV Part 2 Brochure, which describes our business operations, services and fees, please contact us via email at info@SlateStone.com or click on the ADV Brochure link found on the bottom of any page on our website.

SlateStone's website is limited to the dissemination of general information pertaining to its business services and is for informational and educational purposes only. The information provided is for the sole use of our clients, prospective clients, and business partners, and only in connection with the purposes for which it is presented. The firm does not transact business on its website nor should information herein be construed as financial advice. Accordingly, any information published on this website, is not an offer to sell, or an attempt to effect securities transactions or to be considered personalized investment advice over the Internet. To receive financial advice from SlateStone, the consumer or prospective client must enter into a written agreement with the firm after direct contact with one of SlateStone's representatives who is registered in the prospective client's state of residence or who qualifies for an exemption from registration in the state where the prospective client resides.

Each client and prospective client agrees, as a condition of accessing SlateStone's website, to release and hold harmless SlateStone, its officers, directors, owners, employees and agents from any and all adverse consequences resulting from any action and/or omission which are independent of such client or prospective client's receipt of personalized individual advice from SlateStone.

Opinion expressed herein are subject to change without notice. SlateStone makes no representations or warranties as to the accuracy, timeliness, suitability, completeness, or relevance of any information prepared by any affiliated third party, whether linked to SlateStone's website or included herein. Furthermore, SlateStone has obtained information from sources it believes to be reliable, but has not verified such information independently for its accuracy. Links to third-party websites on this site are provided as a convenience. By clicking on a third-party link, you will leave this site and enter a third-party website. We do not control these sites or their content and we are not responsible for the accuracy or reliability of any information, data, opinions, advice, or statements made on these sites. We provide these links merely as a convenience; including such links does not imply an endorsement. We are not liable for any damages or losses caused by your use of any third-party website. While we strive to keep these links up-to-date and relevant, we cannot guarantee their functionality or security. Please note that your use of third-party websites is subject to those websites' terms of service and privacy policies. If you have consented to receive SMS messages from SlateStone Wealth, you may receive SMS messages related to your investment account or any other relevant information. SMS Opt-In and Phone Numbers for the purpose of SMS will not be shared with third parties and affiliates. You can reply STOP to opt-out at any time. Reply HELP for assistance. Message and data rates may apply. Message frequency will vary. You can learn more by visiting our [Privacy Policy](#) and our [Terms & Conditions](#) pages.

By accepting delivery of the information, the recipient agrees that the information set forth may not be reproduced, reprinted, disseminated, displayed, or utilized for any reason other than the purposes expressed by SlateStone without the prior written consent of SlateStone.

Thank you for visiting our website.