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## **PRIVACY POLICY NOTICE**

In providing financial advisory services, I collect nonpublic personal information about you. This policy describes what information I collect, how it will be used, and how it will be maintained.

### **Information I collect**

I collect information about you on forms, statements and other information you (or others authorized by you) provide to me in various ways, including electronically, in writing, and verbally (by phone, in virtual meetings or in person).

This information includes confidential personal information (such as name, address and Social Security number), details regarding financial accounts and other assets and liabilities, and income and expense data.

### **How information is used**

I use your information to assist me in providing financial advice to you. I may also disclose information to third parties as permitted by law – for example, other financial firms providing services to you. I may share information with other professionals designated by you (such as attorneys and CPAs), but only with your prior written authorization.

I may also occasionally be required to provide information about my business to regulatory authorities, including personal information about you.

I do not sell your personal information to anyone for any purpose.

### **How information will be maintained**

Your nonpublic personal information is accessible only to me. I maintain physical, electronic and procedural safeguards designed to protect the security and confidentiality of your information.