

OUR PRIVACY POLICY

YOUR INFORMATION

Your nonpublic personal information is collected from various sources:

- Information received from you on tax organizers, worksheets, client questionnaires, applications and other financial documentation you provide.
- Information you provide during personal interviews and telephone conversations.
- Information about your transactions with the firm.
- Information received about you from consumer reporting agencies if background or credit checks are conducted on your behalf.

NON-DISCLOSURE

Your nonpublic personal information is not disclosed to any person or party, except as required by law or to facilitate filing your tax return.

Upon closing your account, your nonpublic personal information will not be disclosed to any person or party.

SECURITY

Access to your information is restricted in a variety of ways:

- Only to those employees who have a need to know to provide products or services to you.
- Physical security, electronic security safeguards and strict procedural measures consistent with federal standards are in place to protect your nonpublic personal information.

Your privacy is important. Please trust that protecting your information is equally important. Please call if you have any questions.