



## **Privacy Statement**

I am committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to me.

The categories of nonpublic information that I collect from you may include information about your personal finances, information about your health to the extent that it is needed for the financial planning process, information about transactions between you and third parties and information from consumer reporting agencies, e.g., credit reports. I use this information to help you meet your personal financial goals.

With your permission, I disclose limited information to attorneys, accountants, insurance agents and mortgage lenders with whom you have established a relationship. You may opt out from our sharing information with these non-affiliated third parties by notifying me at any time by telephone, mail, fax, email, or in person. With your permission, I share a limited amount of information about you with your brokerage firm in order to execute securities transactions on your behalf.

I maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk. I employ a firewall barrier and utilize web portals, secure data encryption techniques and authentication procedures.

I do not provide your personal information to mailing list vendors or solicitors.

I require strict confidentiality in our agreements with unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors. Federal and state securities regulators may review our Company records and your personal records as permitted by law.

Personally identifiable information about you will be maintained while you are a client, and for the required period thereafter that records are required to be maintained by federal and state securities laws. After that time, information may be destroyed.

I will notify you in advance if my privacy policy is expected to change. I am required by law to deliver this Privacy Statement to you annually, in writing.

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