

# Pursuant to the Graham-Leach-Bailey Act

## Types of Nonpublic Personal Information We Collect:

We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization.

## Parties to Whom We Disclose Information:

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law.

Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

## Protecting the Confidentiality and Security of Current and Former Clients' Information:

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

Please contact us if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.