Privacy Policy

Introduction

This privacy disclosure document explains how we collect, use, and protect your personal information. We are committed to protecting your privacy and ensuring that your personal information is kept confidential.

Information Collection

We collect personal information from you when you open an account with us or when you provide us with information about your financial situation. This information may include your name, address, social security number, and other identifying information.

Information Use

We use your personal information to provide you with investment management and financial planning services. We may also use your information to communicate with you about our services and to provide you with information about other products and services that may be of interest to you.

Information Protection

We restrict access to non-public personal information about you to those employees who need to know that information to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your non-public personal information.

Client Rights

You have the right to access and correct your personal information. You may also request that we delete your personal information from our records.

Contact Information

If you have any questions after reading this Privacy Policy or want to know what information we currently have about you, please contact Investment Advisor Representative.

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