

## **PRIVACY NOTICE**

As required by law, we deliver a Privacy Notice to all of our clients upon establishing a relationship with them and annually thereafter, in order for our clients to understand how we use the information we gather from them.

When performing services for clients, we may collect non-public personal information including:

- Information received from you in conversations and discussions.
- Written information prepared and delivered by you to us.
- Information prepared and delivered by third parties on your behalf.

Although our own outside service providers may have access to your information for normal operational purposes (e.g., offsite electronic file storage, etc.), it is our policy not to disclose any non-public personal information about any client to other outside parties except as may be required or permitted by law, or except as otherwise detailed in this policy.

Disclosures which may be permitted may include the following:

- Instances where a client has authorized us to work with outside service providers such as attorneys, accountants, and other investment advisors.
- Instances where a client has authorized us to disclose information to third parties that assist in processing client transactions or in servicing client accounts.

Clients may opt out from our disclosing information to non-affiliated parties by notifying us by telephone, mail, email or in person.

We take our responsibility to protect the privacy of our clients and their information very seriously. In addition to this privacy policy, we maintain physical, electronic, procedural and other safeguards in order to protect all client information.

If you have any questions about our practices, or more specifically about our privacy policy, please contact us at (913) 261-9316 and we will be happy to give you additional details.