

Privacy Policy

We maintain strict internal policies and procedures to protect your privacy and maintain the confidentiality and security of your personal and financial information.

As part of our advisory services, we collect non-public personal information about you and your family from a variety of sources that may include client applications, interviews or other documentation used to establish your relationship with us and transactions in your accounts with us or through others. The information that we collect is used to serve your accounts. We are committed to protecting the confidentiality and integrity of your information at every level of service provided.

We use this information in our efforts to serve you more effectively in developing your financial plan and providing you with accurate data about your account activity. We also monitor your accounts and activity to keep your plan on track with your financial goals and objectives.

We may disclose non-public personal information about you and your family to non-affiliated third parties upon request and with your approval including financial service providers that assist us in managing your account, non-affiliated third parties that you have approved in writing and regulatory or law enforcement agencies as permitted by law.

We do not sell customer information to third parties or engage in joint marketing activities with non-affiliated companies. We do not share customer information with outside parties who may wish to market their products to you. We are committed to helping you protect your privacy every day. We protect your privacy automatically.

We maintain physical, electronic and procedural safeguards that comply with federal standards to guard your non-public personal information. We are committed to maintaining your confidence in us as your trusted advisors and endeavor to protect your privacy and provide you with exceptional professional services.