

**OUR
COMMITMENT
TO YOU.**

As a client of Precedent Financial Strategies, you have entrusted to our care your personal and financial data. We recognize that your relationship with us is based upon trust and that you expect us to act responsibly and in your best interest.

Because your personal and financial data is your private information, we hold ourselves to the highest standards in its safekeeping and use. This means that we do not sell or divulge client information to others. Instead, your information is used by us to provide financial advice, complete transactions, and make you aware of the financial services that we offer.

**PRIVACY
STATEMENT.**

We have a long-standing commitment to protecting the confidentiality of our client's personal financial information. We believe it will be helpful to have an overview of how this commitment is applied when we collect, use and protect your personal information when you interact with us.

INFORMATION WE COLLECT. To provide you with individualized service, we collect several types of nonpublic personal information about you, including

- information from forms you fill out and send to us in connection with your accounts (such as your name, address, social security number, date of birth, assets, income, etc.);
- information about the transactions in your accounts (such as purchases, sales, account balances, and cost basis);
- information about any bank accounts you use for transfers to and from your accounts;
- information we receive from insurance companies, agencies, personal accountants, and attorneys, such as insurance coverage, income taxes, estate affairs, and family circumstances;
- information we receive about you or your accounts as a result of your communications with us by mail, e-mail, telephone, or in-person.

INFORMATION WE SHARE. In order to complete transactions on your behalf and provide our services to you, we may disclose the information we collect about you to companies that provide services to us. Those companies use that information only to perform the services for which we engage them, and are not permitted to use or disclose that information for any other purpose. Finally, we may disclose information about you at your request (for example, by sending duplicate account statements to someone you designate), or otherwise as permitted or required by law.

INFORMATION SECURITY. Within Precedent Financial Strategies, access to information about you is restricted to those employees who need to know the information to service your account. Our employees are trained to follow our procedures to protect your privacy and are instructed to access information about you only when they have a business reason to obtain it. We use physical, electronic, and procedural safeguards to keep your information secure.

QUESTIONS? For questions about our privacy policy, or for additional copies of our Privacy Notice, please call us at 800-264-9908 or visit <https://precedentstrategies.com/notices/>.