Privacy Notice

We recognize the importance of protecting our clients' privacy. We have policies to maintain the confidentiality and security of your nonpublic personal information. The following is designed to help you understand what information we collect from you and how we use that information as your investment advisor.

Categories of Information We May Collect

In the normal course of business, we may collect the following types of information in order to provide financial planning and investment advisory services to you:

- Information provided during onboarding and while maintaining your accounts (including name, address, social security number, date of birth, income, assets, occupation, and other financial-related information); and
- Data about your transactions with us (such as the types of investments you have made and your account status).

How We Use Your Information That We Collect

We do not sell or share nonpublic personal information for advertising or marketing purposes. We may share personal information as permitted by law, including:

- For everyday business purposes such as processing transactions, maintaining accounts, responding to court orders and legal investigations;
- With service providers who perform services for us, such as custodians, administrators, auditors, compliance consultants, and legal advisors, provided they are obligated to keep the information confidential;
- As required to comply with applicable laws and regulations, including anti-money laundering and fraud prevention requirements.

Because we only share information as permitted by law, clients do not have an opt-out right under federal privacy rules.

How We Protect Your Information

We restrict access to nonpublic personal information to employees and service providers who need to know that information to provide services to you. We maintain physical, electronic, and procedural safeguards designed to protect your personal information. We retain personal information for as long as reasonably necessary to provide services and comply with legal obligations. We respect and value that you have entrusted us with your private financial information, and we will work diligently to maintain that trust. We are committed to preserving that trust by respecting your privacy as provided herein. If you are no longer a client, we will continue to adhere to the privacy policies and practices described in this notice.

Changes to This Notice

We will provide you with a revised privacy notice if we change our privacy policies or practices in a way that affects you.

For questions, please contact North Financial Advisors LLC
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