



Privacy Statement

2024

We, like other professionals who advise on personal and corporate financial matters, are required by federal and/or state law annually to inform our clients of our policies regarding the privacy of client information.

In the course of providing our clients with certain advice, we may receive nonpublic personal or corporate financial information from our clients, their accountants and other representatives, such as financial statements, earnings and press releases, tax returns and other personal and corporate information of a confidential nature.

All nonpublic personal and corporate information that we receive regarding our clients or former clients is held in strict confidence in accordance with our professional obligations, and is not released to people outside the Firm, except with your consent or as required by law or to explain our actions to professional organizations of which we are members.

We may share certain information with third parties who assist us in providing our services to your account (such as administrative and client service functions) or marketing services, as permitted by law, subject to the obligation of these third parties not to use or disclose such information for any other purpose.

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases to comply with professional and/or regulatory guidelines. In order to guard your nonpublic personal and corporate information from unauthorized disclosure, we maintain physical, electronic and procedural safeguards.

If your financial situation, goals or risk tolerance has changed since you last notified us in writing, please contact us immediately.

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