



Privacy Notice

When you become a client of ours, you not only entrust us with your assets but also with certain personal and financial data. We believe that this information is, and should remain, private and confidential. *Under no circumstances will we sell information about you or your Early McClintic & McMillan, LLP portfolio to any company, group, or individual.*

We collect and maintain nonpublic, personal information we receive from you directly, on applications, other forms or our website, and from your transactions with unaffiliated parties and us. This information includes, for example, your name, address, Social Security or tax identification number, assets, income, financial needs and goals, and account balances and transactions. We use this information to process your requests and transactions.

In order to manage your portfolio, we may need to share the information we collect from you with unaffiliated parties. In these cases, we strive to work only with those businesses that adhere to the same high standards of client service and privacy that we do. We restrict access to your nonpublic, personal information to only those employees, agents and unaffiliated parties who need to know the information in order to process your transactions. Of course, if you ask us to provide your information to a trusted third party such as your accountant or attorney, we are glad to oblige. Additionally, on some occasions we may disclose information because we are legally required to do so.

Last but not least, we maintain physical, electronic, and procedural safeguards that comply with applicable federal standards to guard your nonpublic, personal information. We regularly evaluate our technology in an effort to ensure that the safeguards we have in place maintain a high level of security and confidentiality for your personal information.

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