



# EMBREE FINANCIAL Group

## Privacy Policy

*Investment advisers are required by law to inform their clients of their policies regarding the privacy of client information. We are bound by professional standards of confidentiality that are even more stringent than those required by law. Federal law gives the customer the right to limit some but not all sharing of personal information. It also requires us to tell you how we collect, share, and protect your personal information.*

**The Information We Collect About You.** The non-public personal information we collect about you (your "Information") comes primarily from the account applications or other forms you submit to us. This can include but is not limited to your Social Security Number, Date of Birth, Banking Information, Financial Account Numbers and/or Balances, Sources of Income. When you are no longer our customer, we may continue to share your information only as described in this notice.

**Our Disclosure Policies.** We do not disclose your Information to anyone, except in instances pursuant to your express consent, to fulfill your instructions such as to process transactions, maintain your account(s), or to comply with applicable laws and regulations, including responding to court orders and legal investigations, or report to credit bureaus.

**Our Information Security Policies.** We limit access to your Information to those of our representatives and service providers who are involved in offering or administering the products or services that we offer. To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards and secured files and building.

**Opting Out.** Federal law allows you the right to limit the sharing of your Information by "opting-out" of the following: sharing for affiliates' everyday business purposes – information about your creditworthiness; or sharing with affiliates or non-affiliates who use your information to market to you. State laws and individual companies may give you additional rights to limit sharing. Please notify us immediately if you choose to opt out of these types of sharing.

*Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.*