

PRIVACY POLICY

Personal CFO does not disclose any non-public personal information about its customers or clients to non-affiliated third parties except to service or manage the client's account or as permitted by law. Furthermore, Personal CFO restricts access to the personal information of its clients to those employees who need to know that information to provide products or services to the client. Any employee who is authorized to have access to non-public personal information is required to keep such information secure. Any conversations concerning non-public personal information should be conducted by employees in private and care must be taken to prevent unauthorized persons from overhearing and intercepting such conversations. If a client closes their account, Personal CFO will continue to adhere to its privacy policy with respect to the non-public personal information of that client. Personal CFO will also comply with the California Financial Information Privacy Act (SB1) if it does business with California Consumers.