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Privacy Policy

We consider it our great privilege to serve your financial needs and we value the trust you have placed in us. As we serve your financial relationship, we are committed to safeguarding your information.

HERE IS OUR PRIVACY PLEDGE TO YOU:

1. Your privacy is a top priority.
2. The accounts and services you use are provided in a secure environment.
3. We collect information in order to service and administer your relationship.
4. We will work together with you to protect the security of your information, and to keep your information accurate and current.

A note about this information:

The privacy policies described in this publication apply to individuals who obtain a financial service for personal, family, or household purposes, or have done so in the past.

On the pages that follow, you will find our policies and practices for collecting, disclosing, and safeguarding "nonpublic personal information," which may include financial or other information. This notification replaces all previous statements of our consumer privacy policy, and may be amended at any time. We'll keep you informed of changes as required by law.

1. YOUR PRIVACY IS A TOP PRIORITY.

We are committed to your privacy. We take great care to protect the security of your information and to control how it may be used. We will provide annual notification of our privacy policies and procedures to keep our clients informed about this issue.

2. THE ACCOUNTS AND SERVICES YOU USE ARE PROVIDED IN A SECURE ENVIRONMENT.

We use sophisticated technology and security measures to protect your information. We maintain physical, electronic and procedural safeguards that comply with federal regulations to guard nonpublic personal information. You can be confident that our security measures are appropriate to safeguard your personal information.

We are careful to limit access to your nonpublic personal information. Our employees have limited access to information based on their responsibilities. This access enables them to assist you in completing transactions and resolving any service issues that may arise. All employees are instructed to follow the confidentiality guidelines provided in our Code of Ethics, which is strictly enforced.

In addition, nonaffiliated third parties may be given access to information under certain circumstances. For example, a third party who provides a specialized service on our behalf (financial statement or compliance audit) may access only the information necessary to perform that service. Or, in cases when you authorize us to provide your information to others, we limit access only to the specified information, and only for the purpose you have authorized.

3. WE COLLECT INFORMATION IN ORDER TO SERVICE AND ADMINISTER YOUR RELATIONSHIP.

In the course of serving or administering your relationship, we collect a variety of nonpublic personal information, which is provided by you, as well as other sources, and may include:

- Information we receive from you, such as your name, address, social security number, assets, and income, as provided, for example, on an account opening form.
- Information about your transactions with us, our affiliates, and others, such as balances, parties to transactions, and account usage.
- Information we receive from affiliates and other third parties not affiliated with us, such as real estate appraisals.

The information we collect is based on the services we may provide to you. This information is not shared with nonaffiliated third parties unless specifically directed by you, under certain circumstances (referred to above) or required by law.

4. WE WILL WORK TOGETHER WITH YOU TO PROTECT THE SECURITY OF YOUR INFORMATION, AND TO KEEP YOUR INFORMATION ACCURATE AND CURRENT.

As described above, we use a combination of safeguards such as employee training and accountability, strict privacy policies, rigorous security standards, and fraud detection to protect your nonpublic personal information.

You can help to maintain your privacy by taking such precautions as protecting your account and PIN numbers and not disclosing confidential information to unknown callers.

We strive to keep your financial information accurate. If you believe that our records are incorrect or out of date, please notify us as soon as possible by contacting DRT Financial Advisors at (386) 734-9441. We will make any necessary corrections quickly.

Privacy is a partnership. Because privacy matters, we pledge to work together with you to protect and control the security of your confidential financial information.

Thank you for this opportunity to serve you. Your relationship and trust are very important to us. Please be assured that we will abide by our policies and procedures to protect your information.