



Southward Financial Services, LLC

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Privacy Statement and Policy

Southward Financial Services, LLC is committed to safeguarding the confidential information of its clients. We hold all personal information provided by you to the firm in the strictest confidence. These records include all personal information that we collect from you in connection with any of the services provided by Southward Financial Services, LLC.

We have never disclosed information to nonaffiliated third parties, except as permitted or required by law and do not anticipate doing so in the future.

If we were to change this policy, we would be required to notify you in advance and you would have certain rights to block disclosures. Our policy with respect to personal information about you is listed below.

- We do not disclose your personal information to anyone without your permission, except as permitted or required by law.
- The categories of nonpublic information that we collect from a client depend upon the scope and purpose of the engagement.
- With your permission, we may disclose limited information to individuals and firms named by you and/or with whom you have established a relationship.
- We maintain a secure office and computer environment and procedures to ensure that your information is not placed at unreasonable risk.
- We require strict confidentiality in our agreements with unaffiliated third parties that require access to your personal information. Federal and state authorities and regulatory authorities may review our records and your personal records as permitted by law.
- We do not provide your personal information to mailing list vendors or solicitors.
- Personally identifiable information about you will be maintained for the period of time that records are required to be maintained by federal and state laws.
- Should you become an inactive client or should our relationship end, we will continue to protect the confidentiality and security of your personal information in accordance with this privacy policy.