



Privacy Policy Notice
Current as of March 2025

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, LP 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, such as brokers, custodians, and other service providers. 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. Companies we may hire to provide support services are not allowed to use your personal information for their own purposes. We may make additional disclosures as permitted by law, to comply with a court order, subpoena, or similar legal process; to our attorneys and consultants in connection with an audit or regulatory examination or investigation, or when such disclosures will help support our detection of, prevention of, or response to fraud; help protect your safety or security; or protect the safety and security of our services.

We restrict access to your nonpublic, personal information to only those employees, agents and unaffiliated parties who need to know the information to process your transactions.

Employees and our professional service representatives are required to comply with our established information confidentiality provisions. Our employees are trained in the proper handling of sensitive information.

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.

For additional information regarding our privacy policy, please contact us at:

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