

PRIVACY POLICY STATEMENT

We consider it our great privilege to work with you ... and we value the trust you have placed in us. An important component of our relationship with you is our commitment to safeguarding your personal information. This notice will help you understand the measures we take to protect the privacy and security of this information.

GATHERING INFORMATION

As part of providing you with consulting services, we may obtain public and non-public information about you or your clients from agreements, applications, forms and other information that you provide to us, whether in writing, in person, by telephone, or electronically. This information may include your organization and/or your clients' such as name, address, date of birth, social security number/Tax ID, or financial information. The information we obtain will be used only to provide our customers with the products and services we offer.

SECURITY STANDARDS

- We will safeguard, according to strict standards of security and confidentiality, any information our customers share with us.
- We continually monitor and review our processes, computer networks and procedures safeguards.
- Each employee must agree to our confidentiality policy when hired. We permit only authorized employees to have access to your personal information. We do not permit our employees to remove your personal non-public information from the firm upon termination of employment. Employees who violate our confidentiality policy will be subject to our normal disciplinary process.
- We select very carefully the outside companies that provide services on our behalf and restrict the information we provide them to that which is necessary to fulfill their responsibilities or offer a service to you. These companies are prevented by legal agreement from using customer information for their own purposes or selling this information to others.
- We do not sell client lists or individual client information, nor do we make your information available for use by unaffiliated third parties.
- When asked by entities who produce a lawful right to know (such as a subpoena or government regulatory request from the IRS or Department of Justice), we will provide only the information about you that is required and nothing more.

We reserve the right to amend our policy from time to time. If you decide to become an inactive customer, we will continue to adhere to the privacy policies as set forth in this Statement, subject to future revisions.

QUESTIONS, CONTACT US

We welcome the opportunity to answer additional questions you may have about this Statement or the safeguarding and confidentiality of your information. Please contact our firm at info@cucharalegroup.com.