

JVL ASSOCIATES, LLC

PRIVACY POLICY

JVL Associates, LLC is committed to making your financial planning and investment advisory experiences with us both rewarding and satisfying. We take seriously the confidence and trust you place in us and protecting our clients' privacy is a priority to us. This privacy policy demonstrates the importance we place on protecting your privacy.

What Information We Collect:

We collect, retain and use nonpublic personal information about you which you provide to us or that is obtained by us, from third parties, with your authorization.

What Information We Disclose:

In the normal course of our practice we do not disclose nonpublic personal information about you with unrelated third parties.

We will share nonpublic personal information about you under the following circumstances:

- 1) If you specifically request, authorize or consent.
- 2) When necessary to third parties who have a need to know in order to assist us in providing services to you.
- 3) When the disclosure is required by, or allowed by, law or *the Certified Financial Planner Board of Standards, Inc. Code of Ethics and Professional Responsibility*.

Protecting the Confidentiality and Security of Your Information:

While information is critical to our ability to provide quality services, we understand that our greatest asset is our clients' trust. Thus, the safekeeping of our clients' information is a priority to us.

We maintain physical, electronic and procedural safeguards to protect your nonpublic personal information. We educate our employees so that they understand the importance of confidentiality and our clients' privacy.

If you have any questions or concerns about your privacy please feel free to call us.