

## **Privacy Policy**

WebsterRogers Financial Advisors, LLC (WRFA) is committed to client confidentiality and to protect your privacy. The following information is provided, as required by law, to help you understand our privacy policy and how we will handle and maintain confidential personal information as we fulfill our obligations to protect your privacy. "Personal information" refers to the nonpublic financial information obtained by WRFA in connection with carrying out our services.

### **Information We Collect**

WRFA collects personal information as part of our relationship with you to provide client services and fulfill legal and regulatory requirements. The type of information WRFA collects may include:

- Information WRFA receives from you on forms (such as name, address, Social security number, profile documents, assets and income)

- Information you provide WRFA directly about your personal finances or personal circumstances or which WRFA may receive from brokerage statements or other information you authorize WRFA to receive

### **Information Disclosed in Administering Products and Services**

WRFA will not disclose personal information about current or former clients to nonaffiliated third parties except as permitted or required by law. WRFA does not sell any personal information about you to any third party. WRFA will not disclose personal information without your authorization, except as required or permitted by law.

### **Procedures to Protect Confidentiality and Security of Your Personal Information**

WRFA has procedures in place that limit access to personal information to those employees who need to know such information in order to perform business services. In addition, WRFA maintains physical, electronic, and procedural safeguards to guard your nonpublic personal information.

WRFA will update its policy and procedures when necessary to ensure that your privacy is maintained and that WRFA conducts business in a way that fulfills our commitment to you. If WRFA makes any material changes in its privacy policy, we will make that information available to clients through our web site and/or other communications.

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