

PRIVACY STATEMENT

Advisors Financial is committed to maintaining the confidentiality, integrity, and security of the personal information that is entrusted to us.

The categories of nonpublic information that we collect from you may include information about your personal finances, information about your health to the extent that it is needed for the financial planning process, and information about transactions between you and third parties. We use this information to help you meet your personal financial goals.

With your permission, we disclose limited information to attorneys, accountants, and mortgage lenders with whom you have established a relationship. You may ask us not to share information with these nonaffiliated third parties by notifying us at any time by telephone, mail, fax, email, or in person. With your permission, we share a limited amount of information about you with your brokerage firm in order to execute securities transactions on your behalf.

We do not provide your personal information to mailing list vendors or solicitors.

We require strict confidentiality in our agreements with unaffiliated third parties. Examples of third parties who might require access to your personal information are financial service companies, consultants, and auditors. Federal and state securities regulators may review our company records and your personal records as permitted by law.

In order to protect your personal information, we maintain physical, electronic and procedural safeguards to protect your personal information. Our Privacy Policy restricts the use of client information and requires that it be held in strict confidence.

Personally identifiable information about you will be maintained while you are a client and for the period thereafter that federal and state securities laws require maintenance of records. After that time, information may be destroyed.

We will notify you in advance if our privacy policy is expected to change.