

# Williamson Ross Financial, LLC

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## Privacy Notice

Williamson Ross Financial, LLC considers the privacy of its clients to be of utmost importance and has established a policy to maintain the confidentiality of the information you share with us.

In providing asset management services to you, we collect certain nonpublic information about you. Our policy is to keep this information confidential and strictly safeguarded, and to use or disclose it only as needed to provide services to you, or as permitted or required by law. This policy is applicable to information for current and former clients.

### Information we collect:

The personal information we collect directly from you includes information required to communicate with you and assist us in effectively addressing your financial needs. This information could include:

- Name, age and marital status
- Address, telephone number and email address
- Social security number
- Information about your family/dependents
- Employment information
- Sources of income (other than employment)
- Details about your finances and financial circumstance
- Details about your financial account balances and transactions
- Financial goals and experience
- Investment objectives and experience

**How we collect information:**

- Information we receive from you on applications and other forms
- Information we receive from the account statements and/or access you provide
- Information we receive from you via phone or email. Note that email messages sent on the public website are not encrypted and email messages sent directly through email platforms are usually not encrypted. You should not send sensitive information through our public website nor through an unencrypted email.

Our web servers may collect and log your internet protocol (IP) address when you visit pages on our website. The IP log our servers compile does not include personal information about individual visitors. However, using the IP address, we may be able to determine the domain names of internet service providers (ISPs) used to access our site as well as the city and state where the associated visitor was located.

**How information is used and shared:**

All financial companies need to collect clients' personal information to run their everyday business. We use information about you to provide services to you. We may disclose the information to third parties as permitted by law, including the broker/dealers, custodians or other companies used to provide services to you. You may opt out from our sharing information with these nonaffiliated third parties by notifying us at any time by telephone, mail, e-mail, or in person.

From time to time, we may be required to give information about our business to regulatory authorities. This may include personal information about you.

We do not sell our clients' personal information to anyone.

**How information is safeguarded:**

We have procedures in place that we believe are reasonably designed to protect the security and confidentiality of your information. These include confidentiality agreements with companies we hire to help us provide services to you, password-protected user access to our computer files, training of employees, and strict confidentiality policies that apply to all employees.

**Contact information:**

If you have any questions, concerns or comments about our privacy policy, you may contact us at (248)206-5637.