



PRIVACY NOTICE

This letter constitutes notification of our privacy policy. trueNorth Financial Services, LLC is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us.

As your CPA and Financial Planner, we collect:

- Information provided by you from your personal financial profile, data gathering worksheets, documents, and discussions
- Information that we develop as part of the engagement

We use this information to help you meet your personal financial goals.

As your CPA, and Financial Planner we are required to keep all information about our engagement confidential so that we will not disclose any information about you unless we have your approval, the law requires it or we have to release information to defend ourselves in a matter of dispute. This applies even if you are no longer a client. Our firm policy is to keep work papers and records for at least 5 years.

As your CPA, and Financial Planner we are committed to the safe keeping of your confidential information and we maintain physical, electronic, and procedural safeguards to protect your information. We restrict access to non-public personal information to those professionals necessary to complete your financial plan and/or manage your investments.

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

If you have any questions about the privacy of your information, please contact us.

trueNorth Financial Services, LLC
206.652.4314