

PRIVACY POLICY

At JFS we do everything we can to provide our clients with peace of mind. This privacy notice applies to all current and former customers who have shared information with us via our website or phone and in-person conversations. We know you have entrusted us with your financial information and we are committed to safeguarding that private information.

Categories of information we collect

We collect your nonpublic personal information in a variety of ways depending on the level and type of services we provide to you. In order to offer the broadest range of services, we collect nonpublic personal information about you from applications, agreements, or other forms we provide and through your transactions with us and non-affiliated third parties that may assist us in processing your requested or authorized transactions.

Categories of information we disclose

We may disclose nonpublic personal information about you that we receive from you on applications, agreements, or other forms, such as your name, address, social security number, assets, and income. In addition, we may disclose information about your transactions with us, our affiliates, or others, such as your account balance, payment history, and parties to transactions for the strict purpose of processing a transaction that you have requested or authorized.

Categories of parties to whom we disclose information

We do not and will not sell your personal information to anyone at any time. We disclose non-public personal information about you to third parties that assist us in processing those transactions you have either requested or authorized. These third parties may include custodian banks, broker-dealers, and other financial intermediaries. At times, we may present limited information about a client and their financial situation to a third-party professional with whom the adviser consults and has entered into a confidentiality agreement to complete the work necessary for development of the client's investment strategy.

Confidentiality and security

We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic personal information. These safeguards are reasonably designed to:

- ensure the security and confidentiality of customer records and information;
- protect against any anticipated threats or hazards to the security or integrity of customer records and information; and
- protect against unauthorized access to or use of customer records or information that could result in substantial harm or inconvenience to any customer.

If you have any questions or concerns with this notice, or would like to discuss your right to opt out of information sharing, please feel free to contact our office at 253-838-9703.

THE END

Please contact our office if you have any questions or concerns regarding this document.