



## PRIVACY POLICY

Me Financial, PLLC maintains physical, electronic, and procedural safeguards that comply with federal standards to protect its clients' non public personal information ("information"). Through this policy and its underlying procedures, Me Financial, PLLC attempts to secure the confidentiality of customer records and information and protect against anticipated threats or hazards to the security or integrity of customer records and information.

It is the policy of Me Financial, PLLC to restrict access to all current and former clients' information (i.e. information and records pertaining to personal background, investment objectives, financial situation, tax information/returns, investment holdings, account numbers, account balances, etc.) to those employees and affiliated/nonaffiliated entities who need to know that information in order to provide products or services to the client. Me Financial, PLLC may disclose the client's information if Me Financial, PLLC is: (1) previously authorized to disclose the information to individuals and/or entities not affiliated with Me Financial, PLLC, including, but not limited to the client's other professional advisors and/or services providers (i.e. attorney, accountant, insurance agent, broker-dealer, investment advisor, account custodian, etc.); (2) required to do so by judicial or regulatory process; or (3) otherwise permitted to do so in accordance with the parameters or applicable federal and/or state privacy regulations. The disclosure of information contained in any document completed by the client for processing and/or transmittal by Me Financial, PLLC in order to facilitate the commencement/continuation/termination of a business relationship between the client and a nonaffiliated third party service provider (i.e. broker-dealer, investment advisor, account custodian, insurance company, etc.) including information contained in any document completed and/or executed by the client for Me Financial, PLLC (i.e. advisor agreement, client information form, etc.) shall be deemed as having been automatically authorized by the client with respect to the corresponding nonaffiliated third party service provider.

Me Financial, PLLC permits only authorized employees and affiliates who have signed a copy of Me Financial's Privacy Policy to have access to client information. Whenever Me Financial, PLLC hires other organizations to provide services to Me Financial's clients, Me Financial, PLLC will require them to sign confidentiality agreements and/or the Privacy Policy.

Should you have any questions regarding above, please contact Michelle Moses, CFP® at [michelle@mefinancial.net](mailto:michelle@mefinancial.net) or 480.442.5816.