



January 2024

Privacy Policy

Our firm is committed to safeguarding the confidential information of our clients. We hold all personal data provided to us in the strictest confidence. We require your permission before we will discuss your affairs with anyone external to the firm. We deliver this Privacy Policy to all our clients initially upon establishing our relationship and annually thereafter. We believe it important that you understand our uses of the information we gather from you.

In performing our services for you, we may gather non-public personal information about you, as follows:

- Information we receive from you in our conversations, discussions and interviews;
- Information relating to the services we render to you;
- Information you deliver to us in a written, telephonic, electronic, formatted, or other form, however developed;
- Information prepared by and delivered by third parties acting on your behalf; and
- Information collected from your previous advisors or tax preparers.

Please be advised that we do not disclose any non-public personal information about you to third parties (such as brokerage firms, credit-card companies, or insurance companies) except as required by law, or in carrying out the duties for which you retained us. Further, we restrict access to nonpublic personal information about you to those employees and certain service providers who have a business or professional need to know that information for us to provide services to you. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic personal information.

If you have any questions about our privacy notice, we request that you contact us promptly. We value our relationship with you and want to assure that our policies and procedures are clear and acceptable to you.

A current copy of our Form ADV, Part II is available. Please contact us in writing to request a copy.

Respectfully,

J.E. Simmons & Co., P.C.