



## Privacy Policy

This notice provides you with our privacy policies and practices with respect to the disclosure of nonpublic information about you.

In providing you with financial services, Moore Financial Advisors, Ltd. (MFA) collects nonpublic personal information (personally identifiable financial information that is not publicly available) about you from the following sources:

- Information MFA receives from you on applications, tax returns, net worth statements, or other forms;
- Information you allow us to receive about your transactions with MFA or others;
- Other information you or your advisors may provide to MFA in the course of providing personal financial planning services to you.

MFA does not disclose any nonpublic personal information about current clients or former clients to anyone, except as permitted by law or with express permission from you.

If you are an MFA investment advisory client, we may disclose nonpublic personal information about you to your custodian (e.g. Shareholders Service Group) as requested by you or provided by you on their account application forms. MFA may also disclose nonpublic personal information about you to nonaffiliated third parties as permitted by law. For example, we may disclose information to the companies you authorize us to use to provide advisory services to you. Also, under Massachusetts law we may be required to disclose information in response to a court proceeding or to request from a regulatory agency.

MFA may disclose the following kinds of nonpublic personal information about you:

- Information we receive on your application for services or client questionnaire, such as your name, social security number, assets, and income.
- Information obtained in the course of providing financial planning or investment management services to you.
- Information about the transactions in your account.

MFA restricts access to nonpublic personal information about you to those employees and affiliated service providers who need to know that information in order to provide services to you. We maintain physical, electronic, and procedural safeguards that comply with federal and state regulations to guard your nonpublic personal information.

This Privacy Policy applies to nonpublic personal information about individuals who obtain financial services primarily for personal, family or household purposes. Even if you are no longer a client, MFA's Privacy Policy will continue to apply to you.

MFA reserves the right to change this Privacy Policy, and any of the policies described above, at any time. The examples contained within this Privacy Policy are illustrations; they are not intended to be exclusive.

If you have any questions about this Privacy Policy, please call 617-393-9999.