



## **CUSTOMER PRIVACY NOTICE**

This Privacy Notice is from ClearView Financial, LLC, a registered investment advisor with the Commonwealth of Virginia (21VAC5-80-10). We are in the business of providing investment advisory services.

ClearView Financial, LLC is committed to safeguarding confidential information of its clients. All personal information provided to the firm is held in the strictest confidence. No information is disclosed to nonaffiliated third parties, except as permitted by law. Personal information for the duration of the client relationship and for the required time thereafter is maintained in accordance with applicable state and federal regulations.

### **Customer Information**

We collect and maintain personal information from clients for the purpose of assisting in the investment recommendation process. Information that we collect may include but is not limited to the following:

- Personal and household information such as income, spending habits, investment objectives, financial goals, account statements, assets, liabilities, retirement plan interests, wills, trusts, tax returns and basic cash flow statements.
- Pertinent information regarding account opening such as; date of birth, mailing address, physical address, phone number, place of employment, social security, etc.
- Information created via financial plans and/or analysis.
- Information regarding account transactions.
- Information about your services with ClearView Financial, LLC.

The Gramm-Leach-Bliley Act, enacted by Congress in November of 1999, requires certain financial institutions and investment advisors to protect the privacy of Customer Information. Customers must be given the opportunity to opt out of disclosure of information to nonaffiliated third parties by a financial institution. We do not disclose Customer Information to nonaffiliated third parties except as required by law.

### **Data Security**

Access to customer information is restricted to those representatives and employees who need the information to perform their job responsibilities within the firm. We maintain physical, electronic and procedural securities measures that comply with state and federal regulations to safeguard customer information.

### **Former Clients**

Closed relationships will continue to abide by the principles stated in this Notice.