



**ATWILL FINANCIAL  
CONSULTING GROUP, LLC**  
A Registered Investment Advisor

## **PRIVACY POLICY**

Atwill Financial Consulting Group, LLC (“AFCG”) is committed to maintaining the confidentiality, integrity, and security of your personal information that is provided to us.

### **Information We Collect and Maintain**

AFCG collects non-public personal information that may include (but not be limited to) your personal financial data (e.g., household income, expenses, assets, and liabilities), income tax returns, and personal information such as name, date of birth, social security number, contact information, family members, and beneficiaries. We use this information to help us provide financial services that you have requested.

### **Information Sharing**

AFCG will not sell or rent your personal information to any third parties at any time for marketing or solicitation purposes. We will not share your non-public personal information except as required by law or as necessary to provide certain limited information to your selected brokerage firm and account custodian where AFCG’s investment management services are directed.

At your direction and with your written permission only, AFCG will share your non-public personal information with other unaffiliated third parties who provide professional services to you such as your attorney, CPA, or insurance agent.

### **Information Safeguarding**

AFCG will internally safeguard your non-public personal information by restricting access to only those AFCG employees or investment adviser representatives who provide services to you or those who need access to your information to service your account. In addition, we will maintain physical, electronic, and procedural safeguards that meet applicable federal and/or state standards to guard your non-public personal information.

Your non-public personal information will be maintained while you are a client and for the period thereafter as required by law should you terminate your relationship with AFCG.