

## Privacy Notice



The providers of services that are financial in nature are now required to inform their clients of their policies regarding privacy of client information. Although the Foundation has always protected its clients' right to privacy, maintaining the trust and confidence of all clients remains a high priority.

The Foundation collects nonpublic personal information about clients that is provided by or obtained about its clients with your authorization.

For both current and former clients, the Foundation will not disclose any nonpublic personal information obtained in the course of business except as required or permitted by law. Permitted disclosures include, for example, providing information to our employees and in limited situations, to unrelated third party service providers who need to know that information to assist us in providing specific services to you. In all such situations, we stress the confidential nature of the information being shared.

The Foundation retains records relating to services provided to better assist clients and in some cases, to comply with professional guidelines. In order to guard clients' nonpublic personal information, the Foundation maintains physical, electronic, and procedural safeguards that comply with professional standards.

Please call the Foundation offices at (909) 738-4000 or toll-free at 877-322-1001 if you have any questions, because your privacy, our professional ethics, and our ability to provide you with quality services are very important to us.