

# Privacy Policy

## Barton Advisory Services, L.L.C. Privacy Policy

*Barton Advisory Services, L.L.C. is committed to client confidentiality and the protection of your privacy. The following information is provided, as required by law, to help you understand our privacy policy and how we will handle and maintain confidential personal information as we fulfill our obligations to protect your privacy. "Personal information" refers to the nonpublic financial information obtained by Barton Advisory Services, L.L.C. in connection with carrying out our services.*

### **Information We Collect**

Barton Advisory Services, L.L.C. collects personal information as part of our relationship to you, to provide client services and fulfill legal and regulatory requirements. The type of information Barton Advisory Services, L.L.C. collects may include:

- Information Barton Advisory Services, L.L.C. receives from you on forms (such as name, address, Social Security number, profile documents, assets and income);
- Information you provide Barton Advisory Services, L.L.C. directly about your personal finances or personal circumstances or which Barton Advisory Services, L.L.C. may receive from brokerage statements or other information you authorize Barton Advisory Services, L.L.C. to receive.

### **Information Disclosed In Administering Products and Services**

Barton Advisory Services, L.L.C. will not disclose personal information about current or former clients to non-affiliated third parties except as permitted or required by law. Barton Advisory Services, L.L.C. does not sell any personal information about you to any third party. Barton Advisory Services, L.L.C. will not disclose personal information without your authorization, except as required or permitted by law.

### **Procedures to Protect Confidentiality and Security of Your Personal Information**

Barton Advisory Services, L.L.C. has procedures in place that limit access to personal information to those employees who need to know such information in order to perform business services. In addition, Barton Advisory Services, L.L.C. maintains physical, electronic and procedural safeguards to guard your nonpublic personal information.

Barton Advisory Services, L.L.C. will update its policy and procedures when necessary to ensure that your privacy is maintained and that Barton Advisory Services, L.L.C. conducts business in a way that fulfills our commitment to you. If Barton Advisory Services, L.L.C. makes any material changes in its privacy policy, we will make that information available to clients through our Web site and/or other communications.