



Compass Financial Advisors, LLC Privacy Policy

We are committed to protecting and safeguarding all confidential information we receive in the normal course of business and hold such information in the strictest of confidence. We never provide your information to any third party for the purpose of solicitation. During the course of normal business, your information may be shared with the following parties: limited information is shared with the asset custodian; client information may be viewed by government agencies during routine State and SEC investment adviser examinations, or when required by law; limited information may be shared with vendors and application service providers to enhance client service. All of these entities are required to follow strict confidentiality guidelines and can only use client data for the purpose of conducting normal operations. We will not disclose your information to other nonaffiliated third parties without your request or without obtaining prior permission from you. Circumstances where you may request disclosure include, but are not limited to; tax preparation, legal representation, and loan applications. One circumstance where we may ask permission to disclose limited information is for client references. We maintain a secure office environment to ensure that your information is not placed at unreasonable risk. If you have any questions about our privacy policy, please feel free to contact us.