

## PRIVACY STATEMENT

Worley Erhart-Graves Financial Advisors, Inc., an independent financial planning firm, is committed to safeguarding the confidential information of its clients. We hold all personal information provided to our firm in the strictest confidence. These records include all personal information that we collect from clients in connection with any of the services provided by Worley Erhart-Graves Financial Advisors. We have never disclosed information to nonaffiliated third parties, except as authorized by you or required by law, and do not anticipate doing so in the future. If we were to anticipate such a change in firm policy, we would be prohibited under the law from doing so without advising you first. As you know, we use financial information that you provide to us to help you meet your personal financial goals while guarding against any real or perceived infringements of your rights of privacy. Our policy with respect to personal information about you is listed below.

We limit employee access to information to only those who have a business or professional reason for knowing and only to nonaffiliated parties as permitted by law.

For unaffiliated third parties that require access to your personal information, such as auditors, we require strict confidentiality in our agreements with them and expect them to keep this information private. Federal and state regulators also may review firm records as permitted under the law.

We do not provide your personal identifiable information to mailing list vendors or solicitors for any purpose.

We maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk. Ongoing updates are added to our computer network in order to provide the most current and effective security software available.

Personally identifiable information about you will be maintained during the time you are a client and for the time thereafter that such records are required to be maintained by federal and state regulator's securities laws and consistent with the CFP Board Code of Ethics and Professional Responsibility. After this required period of record retention, all such information will be destroyed by a secure method. Our firm uses the services of a bonded shredding company for the disposal of all client documents.