

## Privacy Policy

Investment advisers are required by law to inform their clients of their policies regarding privacy of client information. We are bound by professional standards of confidentiality that are even more stringent than those required by law. Federal law gives the customer the right to limit some but not all sharing of personal information. It also requires us to tell you how we collect, share, and protect your personal information.

### TYPES OF NONPUBLIC PERSONAL INFORMATION (NPI) WE COLLECT

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. This can include but is not limited to your Social Security Number, Date of Birth, Banking Information, Financial Account Numbers and/or Balances and Sources of Income. When you are no longer our customer, we will not continue to use or share your information.

### PARTIES TO WHOM WE DISCLOSE INFORMATION

We only share your information on an as needed basis and only with your permission. All Investment Advisers may need to share personal information to run their everyday business. In the section below, we list some of the reasons that Investments Advisers may share your personal information. GoalVest does not share any of your information.

- For everyday business purposes – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus;
- For our GoalVest’s own marketing efforts – to offer our products and services to you;
- For joint marketing with other financial companies;
- For our affiliates’ everyday business purposes – information about your transactions and experiences and information about your creditworthiness; or

- For non-affiliates to market to you. GoalVest Advisory will not share with non- affiliates to market to you without your consent.

### PROTECTING CONFIDENTIALITY OF CURRENT AND FORMER CLIENT’S INFORMATION

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards and secured files and building. We also use secure cloud storage.

### FEDERAL & STATE LAW ALLOWS YOU TO LIMIT SHARING – OPTING OUT

Federal law allows you the right to limit the sharing of your NPI by “opting-out” of the following: sharing for non-affiliates’ everyday business purposes – information about your creditworthiness; or sharing with affiliates or non-affiliates who use your information to market to you. State laws and individual companies may give you additional rights to limit sharing. Please notify us immediately if you choose to opt out of these types of sharing.

### DEFINITIONS:

Affiliates – companies related by common ownership or control. They can be financial and non-financial companies; Non-affiliates – companies not related by common ownership or control. They can be financial and non-financial companies; Joint marketing – a formal agreement between non-affiliated financial companies that together market financial products or services to you.

***Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.***