MOORE FINANCIAL MANAGEMENT

Moore Financial Management, Inc. Privacy Policy

Revised 01/11/2022

Why?

Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information

What?

The types of personal information we collect and share depend on the service you have with us. This information can include: Social Security number, phone number, address, date of birth, financial account information, assets and liabilities. When you are no longer our customer, we continue to retain your information as described in this notice.

How?

All financial companies need to share clients' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients' personal information; the reasons clients choose to share; and whether you can limit this sharing.

When do we share your information?

The only time we will share your information is:

1) When we have to do so in order to complete the services you hired us for, such as opening and maintaining your accounts or when you request investment or financial planning advice.
2) When we are required to do so by court order or legal investigation.

You cannot limit this sharing.

Your information will not be not shared or sold otherwise.

For Your Protection

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings, as well as other physical, electronic and procedural safeguards.

Please call C Garrett Moore at 941-544-2269 with any questions.