

WJL Financial Advisors, LLC

Privacy Policy

WJL Financial Advisors, LLC (“WJL”) is committed to maintaining the trust and confidence of our clients. We want you to understand how we protect your privacy when we collect and use information, and the measures we take to safeguard that information. To provide you with a high level of service, WJL must maintain certain information. Keeping customer information secure and private is a priority for us. We are providing you with this privacy policy to help you understand how we may collect information, the type of information we may collect and how we keep that information secure. We hope you will take a moment to review this policy.

WJL considers the privacy of its clients to be of fundamental importance and has established a policy to maintain the confidentiality of the information you share with us.

As part of the financial planning, investment management and tax preparation services we provide we collect certain nonpublic information about you. Our policy is to keep this information confidential and strictly safeguarded, and to use or disclose it only as needed to provide services to you, or as permitted or required by law. This policy is applicable to information for current and former clients.

Information we collect

The personal information we collect directly from you includes information required to communicate with you and assist us in effectively addressing your financial needs. This information could include:

- Your name and address
- Investment objectives and experience
- Financial circumstances
- Account balance and account transactions
- Social security number
- Employment information

We collect your personal information, for example, from the following sources:

- Information we receive from you on applications and other forms
- Information about your transactions with us or others

We also collect your personal information from others such as custodians, broker/dealers and other companies.

How information is used

All financial services firms need to share client personal information to run their everyday business. We may disclose the information to third parties as permitted by law, including the broker/dealers, custodians or other companies used to provide services to you. From time to time, we may be required to give information about our business to regulatory authorities or as required by law. This may include personal information about you. We do not sell your personal information to anyone.

How information is safeguarded

We have procedures in place that we believe are reasonably designed to protect the security and confidentiality of your information. These include confidentiality agreements with companies we hire to help us provide services to you, password-protected user access to our computer files, training of employees, and strict confidentiality policies that apply to all employees.

We reserve the right to change this policy at any time as needed and you will be notified if any changes occur.