

McQueen Financial Advisors Privacy Policy

McQueen Financial Advisors believe that protecting our clients' and prospective clients' private, non-public information is paramount to our relationships. We adhere to the following policy to protect all non-public information.

Types of Nonpublic Information We Collect

We collect nonpublic information about you that is provided to us by you or obtained by us with your authorization.

Paper Copies

All paper-based information, utilized daily, which may be non-public information, will be held in the client's files in our office. Once it is determined that the information is no longer needed, it will be shredded.

The following security steps are taken to protect our clients' files:

1. All files are kept in locked filing cabinets.
2. The primary office is kept locked at all times
3. A full service alarm system is utilized to protect the premises.

Electronic Copies

All electronic copies of non-public information are held in the client's folder on our network server. The following steps have been taken to provide security:

1. Active firewall with detection of intruders.
2. Password protection –passwords are changed every 30 days.
3. Physical disconnect from outside lines after business hours.
4. All back up data is placed in a safe deposit box at a Bank

Personnel Policy

As a condition of employment with McQueen Financial Advisors, each employee must sign a confidentiality policy. The policy forbids employees from discussing, providing, and / or disseminating non-public information to anyone outside of the firm. Employees are forbidden from removing client information from the office, except to transport information to and from the client's office.

Parties to Whom We Disclose Information

We do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

The above steps dealing with all forms of documentation, and the strict personnel policy on non-public information, provide our clients and potential clients with the best possible protection.

Thank you for allowing us to serve your investment advisory needs. We value your business and are committed to protecting your privacy. We hope you view our firm as your most trusted advisor and we will work to continue earning your trust. Please call us if you have any questions or if we can be of further service.

Best regards,

A handwritten signature in blue ink, appearing to read 'Ch McQueen', with a long horizontal flourish extending to the right.

Charles N. McQueen
President