Lantz Financial LLC
PRIVACY NOTICE

As required by law, we deliver a Privacy Notice to all of our clients upon establishing a relationship with them and annually thereafter, in order for our clients to understand how we use the information we gather from them.

When performing services for clients, we may collect non-public personal information such as:

- Information received in conversations, discussions and interviews.
- Information delivered or prepared in writing.
- Information prepared and delivered by third parties on a client's behalf.

Although our own outside service providers may have access to your information for normal operational purposes (e.g. offsite electronic file storage, etc.), it is our policy not to disclose any non-public personal information about any client except as may be required or permitted by law, or except as otherwise detailed in this policy.

Disclosures which may be permitted may include the following:

- Instances where a client or former client has authorized us to work with service providers such as attorneys, accountants, custodians, broker-dealers, and other investment advisors.
- Instances where a client or former client has authorized us to disclose information to third parties that assist in processing client transactions or in servicing client accounts.

Clients and former clients may opt out from our sharing of information with the aforementioned outside parties by notifying us by telephone, mail, fax, email or in person.

We take our responsibility to protect the privacy of our clients and their information very seriously. In addition to this privacy policy, we maintain physical, electronic, procedural and other safeguards in order to protect all client information.

If you have any questions about our practices, our privacy policy, about your information we possess, or about how your information is used, please contact us at (331) 204-6230 and we will be happy to give you additional detail.