



Privacy Policy

Registered Investment Advisors, like all providers of personal financial services, are required by law to inform their clients of their policies regarding privacy of client information. As a state regulated Investment Advisor, Mary L. Gibson, CFP® (MLG) defers and maintains compliance with these Privacy Rules. As a Certified Financial Planner certificant, MLG is bound by professional standards of confidentiality that are at least or more stringent than those required by the law.

Types of Non-Public Personal Information We Collect

Your trust and confidence in this firm is valued and the non-public personal information the firm possesses is carefully handled. This information will generally include:

- Information provided from applications, forms and other information provided to MLG either verbally or in writing, and include but are not limited to your name, address phone number, account information, social security number, employment, assets, income and debt,
- Information about your transactions, accounts, trading activity and parties to transactions,
- Information from other outside sources, any other information that is deemed to be non-public personal information as defined by the Gramm-Leach-Bliley Act and by the SEC's Privacy Rule, to which most state regulated Investment Advisory Firms defer.

Protecting the Confidentiality and Security of Client Information

Mary L. Gibson, CFP® will never sell our Clients' non-public personal information to any other person or entity. Information will be shared only when you have expressly directed us to do so or by application to facilitate a financial service offered through this firm or where we may be required to provide information by law or regulation. MLG restricts its records to only those persons who have a need to obtain information in order to deliver advisory or administrative services. In order to guard your non-public personal information, we maintain safeguards that comply with our professional standards.

Please call if you have any questions regarding the privacy policy and procedures of Mary L. Gibson, CFP®.

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