

Zidel Financial, Inc.
Registered Investment Advisor

Privacy Policy

As providers of products and services that involve compiling personal and sometimes sensitive information, protecting the confidentiality of that information has been, and will continue to be, a top priority. Zidel Financial, Inc. ("ZF") believes that you should know about the information we collect, the measures we take to safeguard it, and the situations in which we might share information with others. We value you as a customer and respect your right to privacy. We recognize that you purchase our products and services because you trust that we will stand behind our promises.

ZF may receive non-public information about you from your disclosures, securities and insurance vendors, and others in the normal course of providing financial services to you. This letter explains how we handle and protect the personal information we collect, and it describes our privacy practices for both current and former customers.

- ZF will not share non-public information about customers with third parties with the exception of the securities and insurance vendors we use to serve your investment needs, or as required by law.
- ZF will not sell personal information to outside marketers.
- ZF will at all times maintain physical, electronic, and procedural safeguards to protect customer/personal information we obtain.
- ZF uses protection on the internet such as firewalls, encryption, and authentication verification techniques.
- ZF restricts access to personal information to employees and service providers for legitimate business purposes.
- ZF may share personal information we collect about our customers, prospects, and former customers to services providers such as broker/dealers, custodians, mutual fund companies, insurance companies and their general agents, checking and debit card companies, fraud prevention companies, consumer reporting agencies, government agencies such as tax reporting, and court orders.
- ZF will treat former customers with the same care as existing customers as it relates to privacy.
- ZF will inform customers if if/when any changes are made to our Privacy Policy.

You will receive separate Privacy Policies from the various financial services vendors ZF uses to service your investment needs.

Zidel Financial, Inc. is committed to your Privacy. Please let us know if you have any questions or require additional information.

Douglas Zidel, President
Zidel Financial, Inc.
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