

FOUNDATION FINANCIAL, INC.
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Privacy Policy

For your information; no response necessary.

In order to serve you, Foundation Financial, Inc. collects and uses private information. State regulations, federal regulations, industry association rules and our own ethical concerns influence how we use this confidential information. This **Privacy Policy** indicates how we use nonpublic personal information.

We have non-public personal information from the following sources:

- From the **application** and other forms you complete,
- From your investment **transactions**, and
- From **third parties**, such as consumer reporting agencies.

This information is received as a result of providing a financial product or service to you.

We do not violate your trust by disclosing any nonpublic information about you without your consent, except as required by law. Also, we follow a “need to know” guideline by restricting nonpublic personal information access to the employees, affiliates and independent third parties who need to know nonpublic information in order to provide products and services to you.

We also maintain physical, electronic and procedural safeguards to protect your nonpublic personal information.

*This Privacy Policy information is for clients and / or
fiduciaries of clients, such as Guardians, Trustees and
Custodians.*

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