



Privacy Disclosure

At Scott Marsh Financial we are committed to protecting the confidentiality, integrity, and security of our clients' personal information.

Regulation S-P, Privacy of Consumer Financial Information, requires financial institutions, including *Scott Marsh Financial, LLC*, to provide notice to current clients and prospective clients about their policies and practices concerning the collection and use of customer, non-public information. This privacy policy notice is given to all prospective clients of *Scott Marsh Financial, LLC* upon entering into a contract with *Scott Marsh Financial, LLC* and whenever there is a change to our privacy policy.

Privacy Disclosure Statement. A primary goal of *Scott Marsh Financial, LLC* is to protect the privacy of its clients. *Scott Marsh Financial, LLC* does not sell the personal information of clients to anyone.

To conduct regular business, *Scott Marsh Financial, LLC* will collect non-public personal information from clients. This information is provided by clients to *Scott Marsh Financial, LLC* on applications and other forms provided by clients to *Scott Marsh Financial, LLC* as well as transactions with the firm, our affiliates, or others.

Scott Marsh Financial, LLC enters into contracts with outside third parties so that *Scott Marsh Financial, LLC* can assist its clients in servicing their accounts. In order to do this, *Scott Marsh Financial, LLC* will disclose personal information to companies that help *Scott Marsh Financial, LLC* process transactions for client accounts (for example, executing client trades through a broker/dealer). However, *Scott Marsh Financial, LLC* does not share or disclose any non-public customer information except as allowed or required by law. In addition to sharing information in order to provide financial services to clients, *Scott Marsh Financial, LLC* may provide personal information to our third-party service providers that assist us with business, operational and compliance support. We may also be required to disclose personal information to cooperate with regulators or law enforcement authorities, to resolve customer disputes or for risk control.

Information Safeguarding. *Scott Marsh Financial, LLC* has implemented strict policies and procedures aimed at protecting the sensitive nature of client information. *Scott Marsh Financial, LLC* restricts access to client information to only those members of *Scott Marsh Financial, LLC* that must provide products and services to clients in order to service client accounts. *Scott Marsh Financial, LLC* has implemented physical, electronic, and procedural safeguards aimed at meeting *Scott Marsh Financial, LLC*'s duty to protect non-public client information.

SMS messaging. Text message opt-in data and consent are not shared with any third parties (including subsidiaries and affiliates). If you wish to be removed from receiving future communications, text STOP to opt out.

If you have any questions concerning *Scott Marsh Financial, LLC*'s customer privacy policy or concerns about your personal information please feel free to contact us at 801-272-4677.