

COPE CORRALES Privacy Policy

Cope Corrales understands that trust is the foundation of every relationship and we are committed to safeguard your personal and financial information.

Investment advisers are required by law to inform their clients of their policies regarding privacy of client information. Federal law requires us to tell you how we collect, share, and protect your personal information. We are bound by professional standards of confidentiality that are even more stringent than those required by law.

TYPES OF NONPUBLIC PERSONAL INFORMATION WE COLLECT

We collect nonpublic personal information (NPI) about you that is either provided to us by you or obtained by us with your authorization. We will not solicit information from third parties without first obtaining your permission. NPI can include but is not limited to your Social Security Number, Date of Birth, Banking Information, Financial Account Numbers, Investment Holding and/or Account Balances, Sources of Income, and Tax information. We will limit the collection and use of NPI to what is necessary to successfully manage the relationship.

PROTECTING CONFIDENTIALITY OF CURRENT AND FORMER CLIENT'S INFORMATION

Cope Corrales uses various methods to store and archive client files and other information. To protect your personal information from unauthorized access and use, we use security measures that comply with federal law and industry standards, including computer safeguards and secured files and building.

To mitigate a possible breach of the private information, Cope Corrales uses encryption software on all computers and carefully evaluates any third-party providers, employees, and consultants with regard to their security protocols, privacy policies, and/or security and privacy training. In addition, Cope Corrales has implemented reasonable physical security measures at its home office location.

Cope Corrales has established relationships with outside vendors to ensure that the information employed by Cope Corrales is up to date with developing data security environment. Third party services or contractors used have been made aware of the importance Cope Corrales places on both firm and client information security.

PARTIES TO WHOM WE DISCLOSE INFORMATION

It is Cope Corrales priority to limit and restrict access to clients' information to those employees and affiliates who need to know that information to provide services to its clients. When hiring other organizations, third-party providers, and consultants to provide services to clients, Cope Corrales will engage only with companies that maintain safeguards and privacy procedures consistent with those of Cope Corrales. They will also be required to sign Cope Corrales Confidential Agreements and adhere to our Privacy Policy.

Please call us if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

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