

STEWARDSHIP PARTNERS

PRIVACY POLICY

As Christians dedicated to providing a solid foundation for a long-term, professional relationship based on integrity and trust, we adhere to the following STEWARDSHIP PARTNERS INVESTMENT COUNSEL, INC. PRIVACY POLICY to assure that the information you have provided to us is treated with the utmost confidentiality.

IN MANAGING YOUR ACCOUNT. Stewardship Partners Investment Counsel, Inc. obtains certain nonpublic personal information about you. Our policy is to safeguard this information and keep it strictly confidential, and to use or disclose it only to provide our services to you or as otherwise permitted by law. Our privacy policy applies equally to current and former clients as well as to individuals and companies who inquire about our services.

INFORMATION WE COLLECT. “Nonpublic personal information” is personally identifiable financial information about you or your family. The kind of nonpublic personal information we have about you includes the information you provide us with when you open your account or when we discuss your account with you. This information includes but is not limited to: your name, address, telephone number, family, your employment as well as your personal financial details and investment objectives. We also have information about your account assets, financial transactions as well as brokerage and custodial arrangements for your account.

INFORMATION WE DISCLOSE. We will only disclose nonpublic personal information about you to those persons and entities that provide necessary services to your account or upon your specific authorization and as permitted by law.

HOW WE KEEP YOUR INFORMATION SAFE. We restrict all access to nonpublic personal information about you to only those persons or entities that need it to provide services to you or who are permitted by law to receive it. We maintain strict procedural safeguards to protect the confidentiality of all nonpublic personal information we have about you.

If you have any questions regarding our Privacy Policy, please call Cathy Goddard, Director of Client Services at 800-930-6949 x705. Thank you.