

Kitchen Table Advice on Privacy

When you share personal and financial information with Kitchen Table Advice LLC, a registered investment advisor domiciled in the Commonwealth of Massachusetts, we treat this information in the strictest of confidence.

We know that the information you provide in writing, in person, electronically, or by phone is meant for us to communicate or conduct business with you. This information may come to us in any number of different ways and for a variety of different reasons. For example, forms we ask you to complete, account statements you provide, requests for literature, and personal interviews by phone or even around your kitchen table! Every now and then, information could come from your employer, the government, or businesses providing services to us and may come to us without our even asking for it! Again, we treat this information with strict confidence, both ethically and under the law.

We do not sell client information, nor do we disclose it to others, unless it's required to provide our services, process a transaction, service an account, or as otherwise called for by law. We may share information with Kitchen Table Advice LLC affiliates or agents in the course of providing or offering services to best meet your investing goals. Also, we could share information with companies that perform administrative or marketing services for us, a research firm we've hired, or even a business partner that we're jointly developing or offering investment products or services. Of course, when we enter any arrangement, we restrict the use of our client information and prohibit sharing or using it for any purpose other than that for which we intended.

We have physical, electronic, and process safeguards to protect the information you share with us. Within Kitchen Table Advice, access to this information is limited to the ones who need it to do their job, service your account, resolve any problems you may have, or such like that. Also, our Code of Ethics restricts the use of your information and requires it, again, to be held in the strictest of confidence.

We're always happy to answer questions about our advice on maintaining your privacy. Please call us at (413) 427-2793 or email us at PrivacyPolicy2008@KitchenTableAdvice.com if we can clarify any concerns you may have.

