

Privacy Policy

Charitable Concepts, LLC is committed to safeguarding the confidential information of the organizations and supporters we work with. Outside the course of our normal dealings with you, we do not disclose our customer relationships without your prior written consent, except as may be permitted by law. (See below.)

INFORMATION WE COLLECT FROM YOU

We collect nonpublic personal information from you to assist us in giving you appropriate service. The categories of nonpublic information that we collect from each client depend upon the scope of the client engagement. We collect nonpublic personal information about you from the following sources:

- Information we receive from you on applications or other forms.
- Information about your transactions with us.
- "Nonpublic personal information" does not include information available from public government records, widely distributed media, or government mandated disclosures.

THIRD PARTIES WITH WHOM WE MAY WE SHARE INFORMATION

We do not disclose nonpublic personal information about our clients or former clients to anyone except as otherwise permitted by law. For example, we are permitted by law to share information about you with:

- Our employees and other representatives who may have referred you to our firm.
- Companies that may assist us in our working relationship with you.
- An accountant, tax preparer, or lawyer who is representing you.
- Federal and state regulators who may regulate our firm.

We do not provide your personally identifiable information to direct marketers or independent solicitors (for other companies) for any purpose.

We will maintain personally identifiable information about you during the time you are a client, and for any time thereafter that we are required to maintain the records by federal and state laws. After this required period of record retention, all of your information will be destroyed.

OUR SECURITY POLICIES AND PRACTICES

We take all reasonable steps to assure the privacy of client information. We restrict access to nonpublic personal information about you to those employees who have a business or professional reason for knowing, as permitted by law.

We maintain a secure office and computer environment to ensure that your information is not

placed at unreasonable risk. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.