



Caitlin John
PRIVATE WEALTH MANAGEMENT

PRIVACY POLICY

Caitlin John, LLC considers the protection of personal information to be a foundation of customer trust and a sound business practice. We employ physical, electronic and procedural controls in order to protect client confidentiality. We may use personal information about you to assist us in completing your financial plan, completing transaction or account changes, and to maintain or service your account. We only share information about our clients within the Caitlin John, LLC firm and with certain third-party service providers that assist us in servicing your account. All third-party service providers are required to protect the privacy of your personal information. At Caitlin John, LLC, we will always restrict access to personal information to those who require it to provide products or services to you. The only time we will provide any information about you or your financial information is with your express, written consent as required by law.

If you do not want us to share information, other than required by law, with third parties, please clearly indicate your request in writing. If you wish confirmation of receipt of your request, then enclose a self-addressed stamped envelope. If you have any questions concerning this or other Caitlin John, LLC policies, please contact your investment advisor representative, our Corporate Office at (810) 355-1325, or email us at support@caitlinjohn.com.