



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 if it is required by law or with your express, written consent.

If you do not want us to share information, other than required by law, please clearly indicate your request to us in writing or by email. Please understand that any related third-party service providers that is used to service your account may be affected which can cause delays or accounts to be unserviceable until it is remedied. If you have any questions concerning this policy, please contact your investment advisor representative, our Corporate Office at (810) 355-1325, or email us at info@cjadvisor.com.