

**REQUIRED DISCLOSURE NOTICE - Steve Clott, CPA CFP® EA - Privacy Notice**  
**2024 Darby Road, Havertown, PA 19083-2305**

CPA's, CFP® designees and EA's, like all providers of personal financial services, **should** inform their clients of their policies regarding privacy of client information. They have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy.

**Types of Nonpublic Personal Information We Collect** - We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization.

**Parties to Whom We Disclose Information** - We do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to interested third parties who need to know that information to assist us, and them, in providing services to you. Examples include financial institutions, health care providers, business services, the State Boards of Accountancy, or the CFP® Board of Standards Inc., etc., when requested as part of a disciplinary proceeding. In all such situations, we stress the confidential nature of information being shared. For more information, you may log onto

<http://www.ftc.gov/privacy/glbact/glboutline.htm>

or

<http://www.ftc.gov/privacy/glbact/glbsub1.htm>

**Protecting the Confidentiality and Security of Information** - We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

Please call (610) 446-0440 if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us. Please forward your e-mail address for updates.

Any updates to this privacy notice will be posted at [www.steveclott.com](http://www.steveclott.com)