

PRIVACY POLICY DISCLOSURE NOTICE

Schwartz, Orgler & Jordan, PLLC knows that the privacy of the personal information that we receive about you is important to you. We understand that you trust us to protect the confidentiality and security of that information. The information that we collect about you is used only to provide the legal and fiduciary accounting services that you request from us. Although there is a new federal law designed to protect the privacy of nonpublic personal information about consumers, as attorneys, we have been and continue to be bound by professional standards of confidentiality that are even more stringent than those provided under the Act.

The purpose of this notice is to explain our Privacy Policy and describes how we treat personal information that we receive about you.

Information We May Collect About You

Schwartz, Orgler & Jordan, PLLC collects nonpublic personal information about you only in connection with providing you with the legal and fiduciary accounting services that you request. The types of nonpublic personal information that we collect will vary according to the services we perform for you and may include:

- Information that we receive from you; such as: name, address, social security number, income, assets, liabilities, and other financial or household information.
- Information about your relationship with us; such as: the types of legal services we provide to you, your invoice balances, and your payment history; and
- Information that we receive, with your authorization, from third parties such as accountants, financial advisors, insurance agents, banking institutions and other.

How We Handle Your Information

Schwartz, Orgler & Jordan, PLLC does not disclose any public or nonpublic personal information about you that you provide to us to anyone outside our firm, except as authorized by you or required by law. For example, with your consent, we may disclose personal information to a third party contractor, such as an appraiser or accountant, who is assisting us in providing services to you. In addition, we will release information to the extent required by law or regulation. We do not sell client information to anyone or disclose client information to marketing companies.

How We Protect Your Information

We restrict access to public and nonpublic personal information about you that you have provided to us to those Schwartz, Orgler & Jordan, PLLC attorneys and staff members who need to know the information to provide legal and fiduciary accounting services to you. All Schwartz, Orgler & Jordan, PLLC attorneys and employees are required to maintain the confidentiality of all nonpublic personal information about you. We maintain physical, electronic, and procedural safeguards that comply with both federal law and our more stringent professional standards to protect the public and nonpublic personal information that you have provided to us.