

BARR FINANCIAL SERVICES LLC PRIVACY POLICY NOTICE

This Privacy Policy Notice is being provided to you on behalf of BARR Financial Services, LLC (“BARR”). This notice has been prepared to describe to you what BARR collects, handles, and safeguards your personal information.

Why are you receiving this notice? Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

What information do we collect? The types of personal information we collect and share depend on the service that we provide to you. This information can include, but would not be limited to (1) your social security number and income; (2) your address and date of birth; and (3) your account balances and transactions.

How do we typically share your personal information? Financial companies typically need to share customers’ personal information internally in order to run their everyday business – to process transactions, maintain or service customer accounts, and report to credit bureaus. In the section below, we list the reasons many financial companies can share their customers’ personal information; the reasons we choose to share your information; and whether you can limit this sharing.

Reasons we can share your personal information	Do we share?	Can you limit this sharing?
For our everyday business purposes – To process your transactions, open accounts, report to credit bureaus, and in connection with assistance provided by outside service providers such as attorneys, accountants, regulatory consultants, etc.	Yes	No
For our marketing purposes – To offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	N/A - We don’t share
For our affiliates’ everyday business purposes – With one or more of our affiliated entities, at our sole discretion and for purposes either related or unrelated to services we provide to you, and to nonaffiliated entities that either perform services for us or function on our behalf (such as check printing services, account aggregation providers, broker-dealers, investment companies, and insurance companies).	Yes	No
For our affiliates’ everyday business purposes – Information about your creditworthiness	No	N/A - We don’t share
For our affiliates to market to you	No	N/A - We don’t share
For non-affiliates to market to you	No	N/A - We don’t share
Sharing practices		
How often does BARR notify me about their practices?	We must notify you about our sharing practices when you engage our services and each year while you are a customer.	
How does BARR protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and offices.	
How does BARR collect my personal information?	We collect nonpublic personal information about you from the following sources: <ul style="list-style-type: none"> • Information we receive from you on applications or other forms; • Information about your transactions with us, our affiliates, or others; and • Information we receive from a consumer reporting agency. 	
Why can’t I limit all sharing?	Federal law gives you the right to limit sharing only for <ul style="list-style-type: none"> • affiliates’ everyday business purposes – information about your creditworthiness; • affiliates to market to you; and • non-affiliates to market to you. State laws and individual companies may give you additional rights to limit sharing.	
How does BARR treat my personal information once I am no longer a customer?	The firm will provide nonpublic information about former customers only if required to do so by law or regulation or to those parties who need such information in order for the firm to carry out any continued obligation with respect to the services covered by the former adviser/customer relationship.	
Contact Us	If you have any questions about our Privacy Policy and how we handle your personal information, please let us know. Call 407-622-0018 or email kyoung@BARRLLC.com	