J. F. Williams Co.
INC.

Privacy Statement

This statement describes our commitment to keeping your records private and explains how we collect, use and disclose nonpublic personal information.

Since the inception of our business, we have been 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. We use this information to help you meet your financial goals.

Parties to Whom We Disclose Information

For prospective, current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law, or as requested by the CFP Board. Permitted disclosures include, for instance, providing information to our employees and, in limited situations, to unrelated third parties with whom you have established a relationship and with whom you have authorized the disclosure of that information to assist us in providing services to you. In such situations, we share only that information necessary for the provision of the requested services.

Protecting the Confidentiality and Security of Current and Former Clients' 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 and regulatory guidelines. In order to guard your personal nonpublic information, we maintain physical, electronic, and procedural safeguards that comply with our professional and regulatory standards to ensure that your information is not placed at unreasonable risk.

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Please call 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.

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