



PRIVACY POLICY

Under federal law, you have a right to know what information we collect about you and how that information will be used. This privacy policy describes our handling of information that we have in our records that is both personal and private to you. We consider your privacy to be a top priority.

What personal information do we collect?

We collect personal information during meetings and interviews, and on applications and forms, including your social security number, date of birth, contact information, financial information, and account details as needed.

What personal information do we disclose to others?

We use your personal information to open your accounts, to help you quantify your financial goals, to monitor your investments, to rebalance your accounts, and to provide you with superior client services. Except as required by law, we do not disclose any nonpublic personal information about our clients to anyone.

The information we collect must be provided to companies such as Charles Schwab and other custodians that perform support and trading services on your behalf, as necessary, to effect, administer, or process transactions, or for maintaining and servicing your account. We dedicate ourselves to protect the security and confidentiality of the personal information we collect.

We do not give or sell information about you or your accounts to any other company, organization, individual, or group. If we change this policy, we will give you the ability and opportunity to opt out, thus not permitting any information to be disclosed without your consent.

How do we protect your personal information?

We restrict access to nonpublic personal information about you to those employees who need to know that information to provide services to you and your accounts. Furthermore, we maintain physical, electronic, and procedural safeguards to protect your nonpublic, personal information.

What is the purpose of this notice?

This form is meant to notify you of our privacy policy and how we maintain and secure your nonpublic personal information. Our privacy policy applies to all current and former clients of Firestone Capital Management, Inc. If you have any questions concerning this notice please feel free to contact us.

Our relationship with you is our most important asset. We understand and respect that you have entrusted us with your private financial information, and we do everything to honor that trust.