



Privacy Policy – Disclosure Notice

Financial Advisors, including registered investment advisers and Certified Financial Planners, are now required by law to inform their clients of their policies regarding the privacy of client information. *Eugenias Advisory Group, LLC* (EAG) is bound by strict professional standards; thus we always strive to protect your privacy and will continue to make that a top priority.

Eugenias Advisory Group, LLC collects nonpublic personal information about you that is provided by you, or is obtained by us with your authorization, for the express purpose of serving your financial planning and investing needs.

For current, former clients or prospective clients, 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 providing information to unrelated third parties who need to know that information to assist us in providing services to you, and providing information to our employees. We require all third party vendors to sign a confidentiality disclosure form before beginning their work with us. In all situations, we stress the confidential nature of the information being shared.

We retain records relating to professional services that we provide so that we are better able to serve you with financial planning and investing needs, and in some cases comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic and procedural safeguards in an attempt to comply with federal, state, and our professional standards. We also have procedures to safeguard the disposal of the information when no longer needed.

Please call us if you have any questions, because your privacy, our professional ethics, and our continued ability to provide you with quality financial service are of paramount importance to our firm. This privacy notice or an updated version will be provided to you prior to or at time of engagement, at least annually thereafter and when requested by you.

Velda A. Eugenias, CFP®
Chief Compliance Officer