

STEVENS, FOSTER FINANCIAL SERVICES, INC.

PRIVACY NOTICE

Stevens, Foster Financial Services, Inc., doing business as Stevens Foster Financial Advisors, knows that you care how information about you is used and shared. We are committed to protecting your privacy and maintaining your trust and confidence. This notice describes our Privacy Policy and tells you how we collect, use, share, and protect information about you. Please read this Notice carefully to understand what we do.

What Information Do We Collect?

We may collect the following types of nonpublic personal information about you, depending on the scope of your engagement with us:

- information on account applications or other forms (such as your name, address, Social Security number, phone number, e-mail address, assets and income);
- information about your financial accounts, investment holdings and investment transactions;
- information from your employer, association or benefit plan sponsor regarding any group products we may provide or assist in reviewing on your behalf;
- information from W-2s and 1099s; and
- information we may receive from a consumer reporting agency (such as your credit worthiness and credit history).

How Do We Use the Information We Collect?

We collect information about you to assist us in providing our advisory services to help you meet your financial goals and objectives and to provide high standards of customer service. Your information would be used to process transactions and establish accounts with financial service providers on your behalf. We may also share this information in response to fulfilling legal and regulatory obligations, as permitted by law.

How Do We Keep Your Information Confidential and Secure?

We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic personal information.

With Whom Do We Share Your Information?

We do not disclose any nonpublic personal information about our customers to anyone, except as permitted to conduct our business or as required by law. At such time as you are no longer a client, we will continue to treat and safeguard your nonpublic personal information as described in this Privacy Policy.