

# **CURBSTONE FINANCIAL MANAGEMENT CORPORATION**

## **CURBSTONE FINANCIAL MANAGEMENT CORPORATION CLIENT PRIVACY POLICIES AND PRACTICES**

Pursuant to the Gramm-Leach-Bliley Act

No member of this firm is permitted to disclose any client information to any outside source with the exception of that client's appointed advisors.

The firm will only provide client-pertinent information, upon written or verbal authorization from such client, to the professional advisors serving the client (CPA, Attorney, TPA).

Financial information will be provided to non-professionals only upon receiving written request from the client to do so (banking, other vendors, or individuals).

Under no circumstances are members of the firm allowed to disclose nonpublic personal information about consumers to nonaffiliated third parties.

The purpose of this policy is to ensure the confidentiality of all customer records and protect against unauthorized access to client information.