



Privacy Policy Statement

Long & Associates LLC is committed to maintaining the confidentiality, integrity, and security of the personal information that you entrust to us.

The categories of non-public information that we collect from you may include information about your personal finances and information about your health to the extent that it is needed for the financial planning process. We use this information to help you meet your personal financial goals.

With your permission, we disclose limited information to attorneys, accountants, and mortgage lenders with whom you have established a relationship. You may opt out from our sharing information with these non-affiliated third parties by notifying us at any time in writing.

We maintain a secure office to ensure that your information is not placed at unreasonable risk. We employ a firewall barrier in our computer network, and required authentication procedures to access client information in our computer database.

We never provide your personal information to mailing list vendors or solicitors. We require strict confidentiality in our agreements with unaffiliated third parties that require access to your personal information. State securities regulators may review our Company records and your personal records, as permitted by law. Personally identifiable information about you will be maintained while you are a client, and for the required period thereafter that records are required to be maintained by federal and state securities laws. After that time, information is destroyed.

We are required by Federal law to deliver this Privacy Statement to you annually, in writing.