

Richardson

Financial Services, Inc.

Registered Investment Advisor

Richardson Financial Services, Inc. Privacy Policy

Updated November, 2020

Richardson Financial Services is committed to safeguarding the confidential information provided to us by our clients. In the course of doing business, you may be asked to provide financial data and other personal details to help us determine how to best meet your financial goals.

At Richardson Financial Services we recognize the importance of protecting your privacy. Our associates adhere to strict policies to maintain the confidentiality and security of your personal information.

Confidentiality and Security:

We restrict access to nonpublic, personal information about you to those employees, agents and vendors who need to know that information to provide products or services to you. For example, we may be required to share your Social Security Number, Driver's License or other identifying information, employment, earnings and net worth information for the purpose of establishing new accounts.

Categories of Information that Richardson Financial Services discloses and parties to whom we disclose:

We do not disclose any nonpublic, personal information about our clients or former clients to anyone except as permitted by law.

We do not share information with affiliates for the purpose of marketing to you.

Safeguarding information:

We have procedures in place designed to protect the security and confidentiality of your information. We maintain password-protected user access to our computer files, updated anti-virus and anti-spyware software, and encrypted hardware and software firewalls.

Please contact us at any time to discuss the Privacy Policy in more detail.

Securities offered through J.W. Cole Financial, Inc. (JWC) Member FINRA/SIPC. Advisory services offered through Richardson Financial Services, Inc. Richardson Financial Services and JWC are unaffiliated entities.

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