

MONTAG & CALDWELL, LLC

PRIVACY OF CONSUMER FINANCIAL INFORMATION POLICY

At Montag & Caldwell we recognize the importance of protecting your privacy, and we take the responsibility for protecting your personal financial information very seriously. We are committed to maintaining the confidentiality of information we collect regarding our relationship with you.

To that end, we will adhere to the following policies:

- We acknowledge receiving non-public personal information about our Clients from applications or other forms necessary to establish the Client relationship.
- We may disclose non-public personal information to third party software vendors, on a need to know basis, in order for them to perform certain services.
- We require that these nonaffiliated, third party vendors sign a confidentiality and nondisclosure agreement that requires them to maintain the confidentiality of the information. Otherwise, we do not disclose any non-public personal information about our Clients or former Clients to anyone, except as permitted by law.
- We restrict access to our Clients' personal and account information to those employees who need to know that information to provide services to our Clients.
- When there is a need to dispose of dated, non-public personal information, employees are required to shred, not discard, the data.
- We maintain physical, electronic, and procedural safeguards to protect our Clients' non-public personal information.

We will adhere to the privacy policies and practices described above with regard to our current and former Client relationships.