



Privacy Policy for Halyard Financial, LLC

Halyard Financial LLC (HF) considers privacy to be a fundamental aspect of our relationships. We are committed to maintaining the utmost confidentiality, security, and integrity of our current, prospective and former clients' personal information. HF will never sell any of your information.

What information we collect and retain

We may collect the following types of "nonpublic personal information" about you:

- Information from our initial meeting or subsequent consultations about your identity, such as your name, address, social security number, date of birth, tax, and financial information.
- Information that we generate to service your financial needs.
- Information that we may receive from third parties with respect to your financial profile.

Why we collect your information

We gather information about you so that we can:

- Help design and implement the planning and investment-related services we provide you; and
- Comply with the Federal and State laws and regulations that govern us.

What information we disclose

We are permitted by law to disclose nonpublic information about you to unaffiliated third parties in certain circumstances. For example, in order for us to provide planning or investment management services to you, we may disclose your personal information in limited circumstances to various service providers, such as our clearing firm.

Otherwise, HF will not disclose any personal information about you or your account(s) unless one of the following conditions is met:

- We receive your prior written consent; or
- We have documentation that the recipient is your authorized representative; or
- We are required by law to disclose information to the recipient

Arrangements with companies not affiliated with HF will be subject to confidentiality agreements.

How we protect your information

We restrict and limit access to client information only to those who need to carry out their business functions. We maintain physical, electronic, and procedural safeguards to protect your confidential personal information. We utilize advanced security measures to protect your information, including firewalls, encryption and two-factor authentication on service providers that retain personally identifiable information.