

Murphy & Sylvest

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PRIVACY POLICY

Investment Advisers are required by law to inform their clients of their policies regarding privacy of client information. We are bound by professional standards of confidentiality that are even more stringent than those required by law. We have adopted this policy with recognition that protecting the privacy and security of the personal information we obtain about our customers is an important responsibility. We also know that you expect us to service you in an accurate and efficient manner. Federal law gives clients the right to limit some but not all sharing of personal information. It also requires us to tell you how we collect, share, and protect your personal information. For clarification purposes, Sylvest Advisors, LLC and Thomas E Murphy, CFP, LLC are affiliated but different entities.

TYPES OF NONPUBLIC PERSONAL INFORMATION (NPI) WE COLLECT

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. This can include but is not limited to your Social Security Number, Date of Birth, Banking Information and Financial Account Numbers and/or Balances, Sources of Income, Credit Card Numbers, Information provided on applications or other forms, Communications (electronic, telephone, written or in person) with you or your authorized representatives, Information about your brokerage accounts and transactions (such as purchases, sales, account balances, inquiries, etc.) All personally identifiable information is stored on technology platforms necessary to service customer accounts. When you are no longer our customer, we may continue to share your information only as described in this notice.

PARTIES TO WHOM WE DISCLOSE INFORMATION

All Investment Advisers may need to share personal information to run their everyday business. In the section below, we list the typical reasons that we may share your personal information:

- For everyday business purposes – such as to process your transactions, maintain your account(s), or respond to court orders and legal investigations, or report to credit bureaus;
- For our marketing – to offer our products and services to you in accordance with your goals and objectives;
- For coordination with our affiliate Thomas E Murphy, CFP, LLC.

- To persons necessary to effect transactions and provide services that you authorize (such as broker-dealers, custodians, third-party managers)
- To firms that assist in servicing your account and have a need for such information, such as a broker, custodian, attorney, accountant or auditor.
- As otherwise provided by law;

Prior to sharing your information with any third-party professional advisor, we will receive your specific written permission to do so. If you are a new client we may begin sharing your information with your other professional advisors on the day you sign our agreement. When you are no longer our client, we will not share your information with any third party.

PROTECTING YOUR INFORMATION

We take several measures to protect your personal information. We restrict access to your nonpublic personal information to those employees who need to know that information to service your account. We maintain physical, electronic, and procedural safeguards that comply with federal and state standards. We use security measures that comply with federal law, including computer safeguards and secured files and buildings. Our policy is to never share, sell, or distribute your phone number to any third party without your explicit consent, unless required by law. Mobile data is not shared/sold with any third-parties for marketing purposes. When you are no longer our client, we will not share your information with any third party. We may continue to share your information only as described in this notice.

FEDERAL LAW AND YOUR RIGHT TO LIMIT SHARING - OPTING OUT

Federal law allows you the right to limit the sharing of your NPI by “opting-out” of sharing with other professional advisors for everyday business purposes. State laws may give you additional rights to limit sharing. Please notify us immediately at our address or telephone number if you choose to opt out of these types of sharing.

CHANGES TO OUR PRIVACY POLICY

Our policy about obtaining and disclosing information may change from time to time. We will provide you notice of any material change to this policy before we implement the change.

DEFINITIONS: Affiliates – companies related by common ownership or control. They can be financial and nonfinancial companies; Non-affiliates – companies not related by common ownership or control. They can be financial and nonfinancial companies.

Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.