

Privacy Policy

Privacy Policy Notice

Your privacy is important to us. Your personal information is kept secure. Under federal and state law, you have a right to know what information is being collected about you and how that information will be used. SRF collects nonpublic personal information about you from the following sources:

- Information SRF receives from you on applications or other forms.
- Information about your transactions with SRF; and
- Information that you specifically have had your other professional advisors forward to SRF.

SRF does not disclose any nonpublic personal information about our customers or former customers to anyone, except as permitted or required by law, or as directed by you:

- Under law, the information SRF collects is provided to companies that perform support services on our behalf as necessary to effect, administer, or process a transaction, or for maintaining and servicing your account;
- Certain individuals of SRF are licensed as registered representatives for Crown Capital (CRD#6312), a FINRA member broker/dealer. As a broker/dealer, Crown Capital has supervision responsibilities for its licensed representatives including business activities outside of Crown Capital. As such, Crown Capital reviews, has access to, and maintains all business emails of these supervised persons, including, communication with and about clients of SRF;
- As directed by you, SRF will be working with your other professional advisors and SRF will provide information in our possession that is reasonably requested by the other advisors.

SRF does not give or sell information about you or your accounts to any other company, individual or group, except as permitted or required by law. SRF restricts access to nonpublic personal information about you to those employees who need to know that information to provide services to you. SRF maintains physical, administrative, and technical procedural safeguards to protect your nonpublic personal information. You do not need to call or do anything as a result of this notice. It is meant to inform you of how SRF safeguards your nonpublic personal information.