



**Quantum Financial Advisors, P.A.**  
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## **Privacy Policy**

As financial service providers, we protect your right to privacy. Like all providers of personal financial services, we are now required by law to inform our clients of our policies regarding privacy of client information. Through this policy and its underlying procedures, Quantum Financial Advisors attempts to secure the confidentiality of customer records and information and protect against anticipated threats or hazards to the security or integrity of customer records and information.

### **Nonpublic Personal Information We Collect**

We collect non-public personal information about you including but not limited to name, address, social security number and financial background. Most non-public information you will directly provide to Quantum Financial Advisors. We also, when authorized by you, collect information from your accountant, attorney, insurance agents, bankers, investment advisors, and other financial service providers.

### **Parties to Whom We Disclose Information**

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared. Required disclosures include subpoenas or court orders.

### **Protecting the Confidentiality and Security of Current and Former Clients' Information**

We retain records relating to professional services that we provide so that we are better able to assist you with your financial and personal needs and, in some cases, to comply with our professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with financial service providers' professional standards. Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

Please call if you have any questions regarding the privacy policy and procedures of Quantum Financial Advisors, P.A.