

Privacy Policy

1/1/2022

Sauberan & Company considers privacy to be critical to our relationship with clients. We are therefore committed to maintaining the confidentiality, integrity and security of clients' personal information. It is our policy to respect the privacy of clients and to protect personal information entrusted to us. Internal procedures have been developed to protect this confidentiality, while allowing client needs to be served.

Our Privacy Statement

1. We collect nonpublic personal information about our clients from the following sources:
 - Information we receive from our clients in the course of establishing and managing investment accounts; and
 - Information we receive as part of the financial planning process; and
 - Information about our clients' transactions with us.
2. We do not disclose any nonpublic personal information about our clients to anyone, except as required by law, as otherwise permitted by our clients, to companies that perform support services on our behalf, or to other firms that assist us in providing our clients with services.
3. We restrict access to our clients' nonpublic personal information to those employees who need to know that information to provide services to our clients. We maintain physical, electronic and procedural safeguards to protect our clients' nonpublic personal information.

If you have any questions concerning this policy, please contact us at csauberan@sauberanandcompany.com or 716-439-1265 (office).