

Privacy Policy

At East Bay, we recognize the importance of protecting our clients' privacy and have policies to maintain the confidentiality and security of your nonpublic personal information. This notice is designed to help you understand what information we collect and how we use it.

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, Tax Identification Number, Date of Birth, Banking Information, Financial Account Numbers and/or Balances, Sources of Income, and Credit Card Numbers or Information. When you are no longer our client, we may maintain records containing your information only as described in this notice, though will not be utilized or shared without your authorization.

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 reasons that we may share your personal information:

- For everyday business purposes - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus.
- For our marketing - to offer our products and services to you.

Protecting the Confidentiality of Current & Former Client Information

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards and secured files and building. Our Information Security Policy is available upon request.