Box Financial Advisors, LLC

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A Registered Investment Adviser

PRIVACY POLICY

Investment advisors, like all providers of personal financial services, are now requiredby law to inform their clients of their policies regarding privacy of client information. Investment advisors have been and continue to be bound by professional standards ofconfidentiality that are even more stringent than those required by law. Therefore, wehave always protected your right to privacy.

TYPES OF NONPUBLIC PERSONAL INFORMATION WE COLLECT

We collect nonpublic personal information about you that is either provided to us byyou or obtained by us with your authorization. The essential purpose for collecting this information is to allow us to provide advisory services to you. Information we collect may include:

- Information that you provide on applications or other forms such as income, investment objectives, statements of account, and other records concerning your financial condition and assets, together with information concerning employee benefits and retirement plan interests, wills, trusts, mortgages, and tax returns.
- Identifying information such as your name, age, address, social security number, etc.
- Information about your transactions with us, or others (e.g., broker-dealers, clearing firms, or other chosen investment sponsors).

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 limitedsituations, 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.

PROTECTING THE CONFIDENTIALITY AND SECURITY OF CURRENT ANDFORMER CLIENT'S INFORMATION

We retain records relating to professional services that we provide so that we are betterable to assist you with your professional needs and in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

CHANGES TO OUR POLICY

Clients will be notified in writing of any material changes made to the Privacy Policy concerning how we use your confidential information. Where applicable, you would be given an opportunity to limit or opt-out of such disclosure arrangements.

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.

02/07/2024