

## **Privacy Policy June, 2007**

Dear Client:

Following is our Privacy Policy. We are in the process of changing our name from Smith & Howard Financial Group to Smith & Howard Wealth Management, a name which we feel better describes our services. We will keep you posted.

### **Types of Nonpublic Personal Information We Collect**

We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization. We may collect nonpublic personal information about you from the following sources:

Information we receive from you on applications or other forms; Information about your transactions with us, our affiliates or others; and Information we receive from non-affiliated third parties, including consumer reporting agencies.

Nonpublic personal information is "nonpublic information about you that we obtain in connection with providing a financial service or product to you."

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

We do not disclose any nonpublic personal information about our clients or former clients to unaffiliated third parties, except as permitted by law. When necessary to provide all of the services you request for your account, we may provide nonpublic personal information about you to certain third parties, such as tax professionals, insurance agents, or brokers/dealers that serve or may serve as the custodian of your account, or that may effect securities transactions on your behalf. Such disclosure is only made in order to fulfill our duties in fully serving your account. Under no circumstances do we sell your name or other information to anyone.

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

We retain records relating to professional services that we provide so that we are better able to assist you with your professional 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 our professional standards. This includes measures to protect your information in the course of its disposal.

If you should have any questions regarding our Privacy Policy, please feel free to give us a call at 404-874-6244 and we will be more than happy to discuss this with you.



SMITH & HOWARD FINANCIAL GROUP, LLC