

The Boston Family Office Privacy Notice

We value the trust you have placed in us and are committed to safeguarding your privacy. Our commitment to confidentiality is as follows:

1. We do not disclose any nonpublic personal information about you to third parties, except:
 - Where disclosure is authorized by you;
 - To companies that help us process or service your account(s) and transactions, including custodian banks, brokers and accountants; or
 - In limited circumstances where we believe in good faith that disclosure is required or permitted under law, for example, to cooperate with regulators or law enforcement authorities, resolve consumer disputes or for institutional risk control.
2. We may collect personal, nonpublic information about you from the following sources:
 - Information we receive from you directly or on applications or other forms;
 - Information about your securities holdings from your custodian or broker;
 - Information about your transactions with us, our affiliates or others; and
 - Information we receive from your tax, legal and other advisors.
3. We restrict access to nonpublic personal information about you to our employees and agents for business purposes only. All employees are required to safeguard such information.
4. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic personal information.
5. We have a static website meaning that no client information is stored or accessible from that public address.
6. We will provide you with advance notice of changes in our information-sharing practices, so that you may exercise any of your legal rights regarding our ability to share your information.
7. We adhere to these privacy policies and practices for both current and former customers

Privacy Policy 2.1.2002 – reviewed December 2013, revised 6.6.14