

BMA Advisors, Privacy Policy

This Privacy Policy describes the types of non-public personal information (“Information”) we may collect about you, the purposes for which we use the information, the circumstances in which we may share the information, and the steps we take to safeguard the information to protect your privacy. BMA Advisors, LLC (“BMA Advisors”) is committed to maintaining the trust that you place in us and we recognize the importance of protecting your information.

The information we collect about you is primarily obtained from your account applications and other forms and materials you submit to BMA Advisors during the course of your relationship with us. We may also collect information about the transactions and interactions you engage in with or through BMA Advisors. In addition, we may verify information or obtain additional information about you from consumer reporting agencies or other sources. The information we collect about you would include, but not limited to: your name, address and other contact information, date of birth, occupation, marital status, sources of wealth, investment experience and objectives, risk tolerance, representations about your financial resources, specific identifying information as may be required by law and regulations addressing money laundering, terrorism and related matters, as applicable, your passport, driver’s license or other governmental information, and social security number or tax payer identification. BMA Advisors does not sell customer lists, names or other identifying information.

We do not share information about you outside of BMA Advisors without your consent except for the specific purposes described below, in accordance with applicable laws. We may disclose information we collect from you to companies or third parties that perform support services for BMA Advisors or your account, such as facilitating your transactions with or through BMA Advisors, including those that provide custody of client funds and securities, professional, legal or accounting services, audit or research services, computer related or data maintenance or processing services, or for credit review or reporting services. We may disclose your personal information as permitted or required by law or regulation. Non-affiliated companies that assist BMA Advisors in providing services to you are required to maintain the confidentiality of such information to the extent they receive it, and to use your information only for the purpose of providing such services.

BMA Advisors limits access to your information to authorized BMA Advisors employees and representatives acting on your behalf. BMA Advisors also maintains physical, electronic and procedural safeguards designed to comply with applicable laws and protect against loss, modifications, and unauthorized access to your information. BMA Advisors updates and tests our technology to improve the protection of customer information. Your account is held by Charles Schwab and Company, Inc. as custodian for you, and BMA Advisors acts as investment advisor on the account. You may access account information on the Schwab website. Please refer to their Privacy Policy also to obtain disclosures on how Schwab protects your personal information.

If your financial advisor terminates his or her relationship with BMA Advisors and moves to another broker dealer or investment advisor, we or your financial advisor may disclose personal information to the new financial institution unless you instruct us not to. If you choose to not move your account to the new financial institution you may request that BMA Advisors limit the information shared with the new financial institution. You can withdraw your consent at any time by contacting BMA Advisors.

BMA Advisors reserves the right to change this Privacy Policy at any time to reflect changes in our practices concerning the collection and use of information. If there are material changes to this Privacy Policy, we will notify you in writing or by electronic means. If you require additional information, please contact us at 310-544-3545

By using this Site, you signify your acceptance of this policy. If you do not agree to this policy, please do not use our Site. Your continued use of the Site following the posting of changes to this policy will be deemed your acceptance of those changes.