

Privacy Statement

BelloAdvisers, LLC
212 Aikahi Loop
Kailua, Hawaii 96734

BelloAdvisers, LLC an independent financial planning firm, is committed to safeguarding the confidential information of its clients. We hold all personal information provided to our firm in the strictest confidence. These records include all personal information that we collect from you in connection with any of the services provided by BelloAdvisers, LLC. We have never disclosed information to nonaffiliated third parties, except as permitted by law, and do not anticipate doing so in the future. If we were to anticipate such a change in firm policy, we would be prohibited under the law from doing so without advising you first. As you know, we use health and financial information that you provide to us to help you meet your personal financial goals while guarding against any real or perceived infringements of your rights of privacy. Our policy with respect to personal information about you is listed below.

- We limit employee and agent access to information only to those who have a business or professional reason for knowing, and only to nonaffiliated parties as permitted by law. (For example, federal regulations permit us to share a limited amount of information about you with a brokerage firm in order to execute securities transactions on your behalf, or so that our firm can discuss your financial situation with your accountant or lawyer.)
- We maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk.
- The categories of nonpublic personal information that we collect from a client depend upon the scope of the client engagement. It will include information about your personal finances, information about your health to the extent that it is needed for the planning process, information about transactions between you and third parties, and information from consumer reporting agencies.
- For unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors, we also require strict confidentiality in our agreements with them and expect them to keep this information private. Federal and state regulators also may review firm records as permitted under law.
- We do not provide your personally identifiable information to mailing list vendors or solicitors for any purpose.
- Personally identifiable information about you will be maintained during the time you are a client, and for the required time thereafter that such records are required to be maintained by federal and state securities laws, and consistent with the CFP Board Code of Ethics and Professional Responsibility. After this required period of record retention, all such information will be destroyed.

Permission to share health information with a nonaffiliated third party.

State law prohibits BelloAdvisers, LLC from sharing any of your personal health information with a third party without your permission. You have a right not to permit us to share this information with anyone else. As a financial planning firm, in order for us to discuss your life insurance needs with an insurance company or other insurance professionals, you must check off the box below if you consent to our sharing such information. Please return the consent form to our firm or e-mail your consent to Sam@BelloAdvisers.com

Consent granted: ____ Yes ____ No

Signature: _____

Printed name: _____

Date: _____

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Sample Privacy Statement (Short Form Initial Notice)

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A complete privacy statement concerning our firm's policy is available upon request. You may obtain it in person, or through a written or electronically delivered request to BelloAdvisers, LLC, at Sam@BelloAdvisers.com, or simply by calling us at 808-254-0022.

Contractor acknowledges that the information provided by BelloAdvisers, LLC. to Contractor, or about which Contractor becomes aware as a result of this contract, is proprietary information and that Contractor recognizes that BelloAdvisers, LLC is required by law to protect and keep confidential nonpublic personal information obtained from consumers. Contractor agrees not to disclose, either directly or indirectly, to any person (e.g., individual, firm or business) any information obtained from BelloAdvisers, LLC. unless the information is "publicly available information," as that term is defined at Title 17, Code of Federal Regulations, section 248.3(v). Contractor further agrees not to use such information for any purpose other than as provided in this agreement and to establish procedures to protect the security and confidentiality of such information. This provision shall survive termination of this agreement.

Confidentiality of Proprietary Information
at BelloAdvisers, LLC

_____ (BelloAdvisers, LLC or independent contractor) recognizes and acknowledges that as a result of my employment with BelloAdvisers, LLC (the "firm"), I will become aware of confidential and proprietary information concerning the firm's services, client development and service strategies, marketing and pricing strategies, and information about existing and future clients, all of which are valuable and unique assets of the firm's business. Accordingly, I agree that I shall not, whether during or after the term of my employment with the firm, disclose such information to any person, firm, corporation, or association or any other entity for any reason.

Signature
Printed Name
Date