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THOMASON FINANCIAL SERVICES, LLC
PRIVACY STATEMENT

Thomason Financial Services, LLC is a registered investment adviser with the state of North Carolina and its sole member, W. George Thomason is a CPA licensed by the NC Board of CPA Examiners, specializing in personal tax planning and preparation. Investment Advisers, like most providers of personal financial services, are required by law to inform their clients of their policies regarding privacy of client information. CPA's and tax professionals registered to practice before the Internal Revenue Service generally are required to inform clients, as they are bound by professional standards of confidentiality that are even more stringent than those required by laws governing other financial service providers. Because I may be providing you with both investment advisory and CPA services, I am providing you with this Privacy Statement. Please realize I have always protected your right to privacy and will continue to do so.

Types of Nonpublic personal information I collect

I collect nonpublic personal information about you that is provided to me by you or obtained by me from third parties with your authorization. Questionnaires I provide you to complete for annual income tax preparation engagements or periodic personal financial planning or investment advisory engagements by their nature ask for your most sensitive nonpublic personal information, including your social security number, birthdates, contact information, account information and specific financial values.

Parties to whom I disclose your information

For current and former clients, I do not disclose any nonpublic information obtained in the course of my practice except as required or permitted by law. Required disclosures included legally required disclosures made in response to a subpoena or certain tax authority enforcement proceedings. Whenever allowed by law, I will inform you of any required disclosure that I make of your nonpublic personal information.

Permitted disclosures include, for example, providing information to my employees (currently, I am the only employee of my firm) and in limited situations, to unrelated third parties who need to know that information to assist me in providing services to you, including, but not limited to, the following:

- For tax return preparation engagements where you authorize me to file electronically on your behalf, I originate your electronic return and submit your data to an unrelated vendor who processes with the IRS and state tax authorities.
- For personal financial planning engagements, you and/or I will input personal information into a software program that I license from an unrelated vendor.

Any other disclosure of your nonpublic personal information by Thomason Financial Services, LLC will be done only with your specific, written authorization. In all situations where your information is disclosed, I will stress to the recipient the confidential nature of the information being shared.

Unrelated vendors maintain Privacy Statements of their own and I am not responsible for the content or security of any vendor's software, processes or website. As part of our engagement, I will provide you with access to the vendor's Privacy Statement.

<u>Protecting the confidentiality and security of current and former clients' information</u>

I retain records relating to professional services that I provide so that I am better able to assist you with your professional needs and, in some cases, comply with professional guidelines. In order to guard your nonpublic personal information, I maintain physical, electronic and procedural safeguards that meet or exceed industry standards and comply with professional standards.

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Please contact me if you have any questions, because your privacy, my professional ethics and the ability to provide you with quality financial services are of utmost importance to me.