ROTH FINANCIAL GROUP
200 West Merritt Island Causeways, Merritt Island, FL 32952
321-454-3398

PRIVACY POLICY

Roth Financial Group, like all providers of insurance and personal income tax preparation services, is required by law to inform our clients of our policies regarding privacy and client information. We are always committed to protecting your personal information and right to privacy.

Types of Nonpublic Personal Information We Collect
We collect nonpublic personal information about you that is provided to us by you, or obtained with your authorization. We collect and use this information to service your accounts and respond to your requests.

Parties to Whom We Disclose Information
For current and former clients, we do not disclose any non-public personal information obtained in the course of our practice, except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees and, in limited situations, to unrelated third parties who need that information to assist us in providing services to you. We may refer this information to an affiliated financial or tax professional where such referral is thought to be in your interest. Please advise us if instead you would require us to hold all information, including basic directory information, confidential under any circumstance. We restrict access to non-public personal information to those professionals necessary to helping you achieve your goals and we maintain physical, electronic and procedural safeguards that comply with federal standards to guard your non-public information.

How Does Roth Financial Group Collect Data and How Long Will It Be Stored?
Whenever we collect personal data in our office via paperwork, during a personal interview or via our website systems, this policy informs you about the extent to which we collect. We will not collect personal data without explicit consent via this signed privacy form. All personal data will normally be stored until it has fulfilled the purpose for which it was collected. However, if a prospective client wants his/her personal data removed from our databases, we will delete that data upon written request in accordance with applicable laws.

Policies Regarding Our Website Systems
Roth Financial Group is committed to continuous improvement. We may gather and analyze non-personal data regarding the use of our websites - including domain names, number of hits, pages visited, length of user sessions etc., to evaluate the usefulness of our sites. These numbers are used for statistical purposes only and are not shared with any organizations outside of Roth Financial Group. The personal information gathered may be transferred to areas within Roth Financial Group and will not be shared with any organizations outside of Roth Financial Group, except where permitted by law. It will only be used according to the purpose described on the respective page where the data is collected. We will not share the personal information.

Keeping up to date with our Privacy Policy
As required by law, Roth Financial Group will provide notice of our policy annually as long as you maintain an ongoing relationship with us. To receive a copy of the most up to date Privacy Policy, call us at (321) 454-3398. We may make changes to this policy at any time and will inform you of changes as required by law.

Confidentiality and Security
Our employees are required to follow procedures with respect to maintaining the confidentiality of our clients' non-public personal information.

If at any time you are not satisfied with our procedures to protect your privacy, or if you have questions regarding the collecting and/or use of your personal data, please contact us. We will use all reasonable efforts to promptly address your concern. Your privacy, our professional ethics and the ability to provide you with quality insurance, and tax preparation services are very important to us.

______________________________	______________________________
Client Name (please print)	Client Name (please print)
______________________________	______________________________
Client Signature Date	Client Signature Date