Privacy Policy

Shankland Financial Advisors, LLC is a registered investment advisor and, as such, we are required to disclose how we treat your personal information. We understand the seriousness and sensitivity of privacy issues and want to provide the following assurances:

1. *We do not sell information about you to anyone;*
2. *We use your personal, non-public information only to conduct authorized business or as provided by law;*
3. *We protect that information from unauthorized use; and*
4. *We do not discuss your account with anyone you do not authorize. You are now allowed to name a "Trusted Contact" on your accounts at Schwab and we encourage you to do so.*

Additionally, we are required to offer to you, on at least an annual basis, our most recent disclosure statement as set forth on Form ADV Part II. If you would like a copy of our most recent disclosure statement now or at any time throughout our relationship, please send us a written request. Additional information about our firm is available on Part I of Form ADV which is available at www.advisorinfo.sec.gov. If you are unable to access this site, please send us a written request for a printed copy.

We strive to meet with all of our investment advisory clients at least once a year to review our previous services and recommendations, and to discuss the impact of any changes in your financial situation or investment objectives. Should your financial situation or investment objectives change, please contact us and we will respond immediately.

Thank you for your business and your trust. We appreciate your continued partnership with us.