



Privacy Policy.

Our Commitment.

As a client of Fi3 Financial Advisors, LLC, you have entrusted to our care your personal and financial data. We recognize that our relationship is based upon trust and that you expect us to act responsibly and in your best interest. As your personal and financial data is your private information, we hold ourselves to the highest standards in its safekeeping and use. This means, most importantly, that we do not sell client information – whether it is personal information or the fact that you are a Fi3 client – to anyone. Instead, client information is used by Fi3 primarily to provide financial advice and to complete transactions.

Privacy Statement.

We have a long standing commitment to protecting the confidentiality of our clients' personal financial information. Nonetheless, we believe it will be helpful to have an overview of how this commitment is applied when we collect, use and protect your personal information.

To provide you with individualized service, we collect several types of non-public personal information about you, including:

- Information from forms you fill out and send to us in connection with your accounts (such as your name, address, social security number, date of birth, assets, income, etc.)
- Information about the transactions in your accounts (such as purchases, sales, account balances and average cost)
- Information we receive from insurance companies, agencies, personal accountants, and attorneys (such as insurance coverage, income taxes, estate affairs, etc.)

We do not disclose your personal information to anyone except as permitted by law. This is for us to complete transactions you authorize and so that we can provide you information about our services. We may disclose the information we collect about you to companies that provide services to us. Those companies use that information only to perform the services for which we hired them, and are not permitted to use or disclose that information for any other purpose.

Within Fi3, access to information about you is restricted to those employees who need to know the information to service your account. We use physical, electronic and procedural safeguards to keep your information secure.

Questions?

If you have any questions or would like a physical copy of our Form ADV and Privacy Policy, please call us at 866.343.5203.