The PFE Group
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PRIVACY POLICY NOTICE
PFE Advisors, Inc. d/b/a The PFE Group

The intent of our Privacy Policy is to recognize and protect the privacy and security of the personal information we obtain from our clients.

PFE Advisors, Inc. d/b/a The PFE Group is required by law to inform its clients about policies regarding privacy of client information. Investment Advisers serving as fiduciaries are bound by professional standards of confidentiality. We value our relationship with you and are committed to protecting the confidentiality of non-public personal information.

Collecting Information

In the course of our engagement, we may be required to collect non-public personal information about not only the 401(k), pension or profit sharing plan, but also your employees, including that which is provided to us by you, obtained by us with your authorization, or provided to us by your employees during the normal provision of our services. The non-public personal information we collect may include:

- Employee names, addresses, phone numbers, social security numbers, email addresses and accounts with others;
- Information related to employment, income finances, and other personal characteristics.

Sharing Information

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 very limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all situations, we stress the confidential nature of information being shared. Any service providers and others to whom we provide information are obliged to use such information only for the purposes stated. Our information sharing practices apply to our former, current and future clients.

Privacy Policy Notice

We provide our Privacy Policy at the start of the client relationship. We also send a Privacy Policy notice to current clients each year. If you are no longer a client, we will follow our then current Privacy Policy, but will not send you further notices.

Changes in Privacy Policy

We reserve the right to change our Privacy Policy at any time. We will provide current clients with a revised Privacy Policy if we make material changes.

Safeguarding Information

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and in some cases to comply with professional guidelines. In order to guard your non-public personal information, we maintain physical, electronic, and procedural safeguards designed to protect and prevent access to non-public information. Our safeguards comply with Massachusetts and federal regulations, in addition to investment advisor industry professional standards.

Our primary goal is to meet the needs of our clients and, in so doing, to protect your privacy requirements. Please do not hesitate to contact us if you have any questions.