Financial Dimensions
OF FIRST FINANCIAL FEDERAL CREDIT UNION

FINANCIAL PLANNING · WEALTH MANAGEMENT · TAX PREPARATION

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PRIVACY POLICY

The privacy of our client information has always been of utmost importance to us, and we have always been bound by professional standards of confidentiality. We are also required by law to formally inform you of our privacy policy.

We collect nonpublic personal information about you that is provided by you or obtained by us with your authorization. This information may come from various sources, including information we receive from personal interviews, tax organizers, worksheets and other documents necessary to provide investment, wealth management, and professional services to you.

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as permitted or required by law, or when necessary to process transactions requested by a client.

We restrict access to nonpublic personal information about you to employees and contractors of FINANCIAL DIMENSIONS LLC and First Financial of Maryland Federal Credit Union who need to know that information in order to provide you professional services. We retain records relating to the professional services that we provide you in accordance with accounting and government standards. We employ physical, electronic, and procedural security safeguards to protect your nonpublic personal information.

Client financial profiles and disclosed assets may be shared with outside third-party service providers under the following conditions: a) to transmit client account information to FINANCIAL DIMENSIONS LLC's performance and billing consolidation software, b) to transmit client financial profiles for suitability analysis on behalf of FINANCIAL DIMENSIONS LLC.

Your confidence and trust are important to us. If you have any questions or concerns regarding the privacy of your nonpublic personal information, please contact us.

We will notify you in advance if our privacy policy is expected to change. We are required by law to deliver this Privacy Notice to you annually.