



## Privacy Policy Notice

As a client of Horizon Financial Services, LLC, your privacy is very important to us and we are dedicated to safeguarding your personal and financial information. Federal law requires us to tell you how we collect, share, and protect your personal information. It also gives you the right to limit some, but not all sharing. *Please read this notice carefully to understand what we do with your personal information and your options for limiting our sharing.*

All financial companies need to share their clients' personal information to run their everyday business but they can choose how they share this information. This section explains the reasons financial companies share client information, if Horizon Financial Services, LLC chooses to share, and your ability to limit our sharing.

Reasons we can share your personal information:	Do we share?	Can you limit this sharing?
➤ <b>For everyday business purposes –</b> to process your transactions, maintain your account(s), respond to court orders and legal investigations or report to credit bureaus	Yes	No
➤ <b>For marketing purposes –</b> to offer our products and services to you	Yes	Yes
➤ <b>For joint marketing with other financial companies</b>	No	We don't share
➤ <b>For our affiliates' everyday business purposes –</b> information about your transactions and experiences	Yes	Yes
➤ <b>For our affiliates' everyday business purposes –</b> information about your creditworthiness	No	We don't share
➤ <b>For our affiliates to market to you</b>	Yes	Yes
➤ <b>For non-affiliates to market to you</b>	No	We don't share

Definitions:	
<b>Affiliates</b>	Companies related by common ownership or control. They can be financial and non-financial companies.
<b>Non-affiliates</b>	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
<b>Joint marketing</b>	A formal agreement between non-affiliated financial companies that together market financial products or services to you.

- The type of personal information we collect and share depends on the type of product or service you have with us but can include your Social Security number, income, account balances and payment history. For example, we collect your personal information when you open an account or deposit money.
- To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards, as well as secured files within our building.

- Federal law gives you the right to limit the following:
  1. Sharing your information to market our products and services to you
  2. Allowing our affiliates to use information about your transactions & experiences for everyday business purposes
  3. Sharing your information with our affiliates for the purpose of marketing to youState laws and individual companies may give you additional rights to limit sharing.
- If you choose to limit sharing on an account you hold jointly, your choices will apply to everyone on your account – unless you tell us otherwise.

### To Limit Our Sharing of Your Information

If you would like to limit our sharing of your information, please complete this form and submit it to our office, either in person or by mail to the address listed below. You may complete this form at any time to limit our sharing.

- If you are a new client, we can begin sharing your information from the date you receive this notice.
- When you are no longer a client, we continue to share your information as described in this notice.

Client Name/s: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Account Number(s): \_\_\_\_\_

#### **Mark any you want to limit:**

- Do not use my personal information to market to me.
- Do not share information about my transactions and experiences with your affiliates for their everyday business purposes.
- Do not allow your affiliates to use my personal information to market to me.

#### **For joint account holders:**

- Apply these choices only to me

#### **Please submit to:**

Horizon Financial Services, LLC  
3880 Vest Mill Road, Suite 100  
Winston-Salem, NC 27103

#### **Questions?**

Please contact our office at (336) 659-7060 with any questions or concerns you have about our privacy policy.