



# MELLEN MONEY MANAGEMENT, LLC

## PRIVACY POLICY

### Introduction

This document (“Privacy Policy”) outlines how Mellen Money Management, LLC (“MMM”) handles privacy-related matters. MMM recognizes the importance of protecting the privacy of its clients. The Privacy Policy pertains to MMM’s collection of data, including certain types of personally-identifiable information (“Personal Information”). This collection of data may occur online at the MMM website (“Site”) or offline by an employee of MMM or an authorized representative of MMM. The Privacy Policy describes how MMM may collect, secure, utilize, process, transfer, or share the Personal Information of its clients.

Each user of this Site expressly accepts the conditions of the Privacy Policy and the [Terms of Use](#).

### Categories of Personal Information Collected by MMM

In the normal course of business, MMM collects Personal Information directly from its clients. Please be advised that MMM utilizes Google Forms in order to provide convenient, paperless options for the submission of forms. The Personal Information that MMM may collect includes, but is not limited to:

- Full Name
- Date of Birth
- Social Security Number
- Gender
- Email Address
- Telephone Number
- Mailing Address
- Job Description
- Name of Employer
- Annual Income
- Beneficiary Information

### Use of Personal Information Collected by MMM

Any and all Personal Information is not, and will not be, shared with any unauthorized representatives of MMM. In the normal course of business, MMM may disclose the categories of Personal Information listed above to unaffiliated third-party service providers involved in the servicing and administration of products and services. The aforementioned unaffiliated third-party service providers include, but are not limited to: (a) administrators of MMM; (b) auditors of MMM; and (c) legal advisors of MMM. In addition, MMM may disclose Personal Information as required by law (e.g. responding to a subpoena), to satisfy a request from a regulator, or to prevent fraud. Without limiting the foregoing, MMM may disclose Personal Information to governmental entities and others in connection with meeting obligations to prevent money laundering.



## **Accessing, Updating, and Deleting Personal Information Collected by MMM**

In order to access, update, or delete Personal Information, please contact MMM at the following email address: [ssnider@mellenmoney.com](mailto:ssnider@mellenmoney.com).

### **Right to Update Privacy Policy**

MMM reserves the right to add to or modify the Privacy Policy at any time and for any reason, simply by posting such addition or modification on the Site. Any such addition or modification becomes effective immediately upon posting on the Site.

### **Confidentiality and Security**

MMM maintains safeguards in order to protect Personal Information. MMM restricts access to Personal Information to employees of MMM and authorized representatives of MMM. Any and all employees of MMM and authorized representatives are bound by the conditions of the Privacy Policy. Although MMM takes appropriate measures to safeguard against unauthorized disclosure of Personal Information, Internet transmissions cannot be fully controlled. Accordingly, MMM cannot guarantee that Personal Information will never be compromised.

**(Last Updated: July of 2017)**