

Privacy Notice

Bigelow Investment Advisors Privacy Policy

Bigelow Investment Advisors is committed to protecting your privacy. Our privacy policy describes the types of information we collect, how it is used by our firm, circumstances under which we share information with third parties, and our obligation to notify you of any changes in our policies.

We collect nonpublic information about you from applications and other forms, from transactions made in your brokerage accounts and from information you provide to us directly.

We use this information to manage your investment portfolios, to calculate your fees and performance, to reconcile our records with those of your custodian and to produce reports, graphs, etc. on the specific assets and value of your accounts. We may combine this information with data from non-affiliated third parties, such as rating agencies, as well as other information you provide us to assist in the management of your investments.

We may use non-affiliated service providers to assist us in analyzing and managing your financial assets. We disclose non-public information to non-affiliated third parties for our everyday business purposes including to effect, administer, or enforce transactions that you request or authorize or in connection with processing or servicing your accounts.

We do not disclose nonpublic personal information about our current and former customers to affiliates or nonaffiliated third parties, except as authorized by Securities and Exchange Commission Regulation S-P sections 248.14 and 248.15. We make disclosures to other nonaffiliated third parties as required by law.

We may disclose information to non-affiliated third parties such as a mortgage lender, your accountant or attorney, but only with your written consent. You may revoke your consent at any time.

If we make any material changes in our policies with respect to the types of information we collect or the information we share with unaffiliated third parties, we will notify you. In addition, federal regulations require that we supply you with our privacy statement annually.

In order to ensure the security and confidentiality of customer records and information, we have developed policies that address administrative, technical, and physical safeguards for the protection of customer records and information. As required by law, our policies are designed to protect against unauthorized access to or use of customer records or information that could result in substantial harm or inconvenience to any client.

