

## Privacy Policy

### Introduction

Stillwater Financial Services (“we,” “us,” or “our”) is committed to protecting your privacy. This Privacy Policy explains how we collect, use, share, and safeguard your personal information when you engage our investment advisory services.

### Information We Collect

1. **Personal Information:** This may include your name, address, email address, phone number, Social Security number, financial information, and any other details provided to help us offer investment advice.
2. **Usage Information:** When you interact with our website or digital platforms, we may collect information such as browser type, pages visited, and IP addresses to improve our services.

### How We Use Your Information

1. **Service Provision:** We use personal information to provide investment advice, manage client portfolios, and fulfill regulatory obligations.
2. **Communication:** We may send information about service updates, account information, and administrative matters.
3. **Improvement of Services:** We analyze user interactions to enhance our offerings and address technical issues.

### Information Sharing and Disclosure

1. **Service Providers:** We may share personal information with trusted third-party service providers who assist us with business operations (e.g., custodians, technology providers).
2. **Legal Compliance:** We may disclose personal information to comply with applicable laws, regulations, or court orders, or to respond to lawful requests from government agencies.
3. **Consent:** We will seek your consent before sharing personal information for any other purpose not described above.

### Data Security

We implement reasonable administrative, technical, and physical security measures to protect your personal information from unauthorized access, disclosure, or misuse. However, no method of transmission over the internet is entirely secure, and we cannot guarantee absolute security.

### Data Retention

We retain personal information as long as necessary to fulfill the purposes described in this policy or as required by law and regulations.

**Your Choices and Rights**

You have the right to review, correct, or update your personal information. To exercise these rights or if you have questions about how we handle your data, please contact us using the information below.

**Changes to This Policy**

We may update this Privacy Policy from time to time. Any changes will be posted on our website with an updated revision date, and where required by law, we will notify you.

**Contact Us**

If you have any questions, concerns, or requests regarding this Privacy Policy, please contact us at:

**Phone:** 405-215-9063

**Email:** [cody@stillwaterfinancialservices.com](mailto:cody@stillwaterfinancialservices.com)

**Address:** 1431 S Western Ave, Stillwater, OK, 74074

*This Privacy Policy is for informational purposes only and does not constitute legal advice.*