



revofinancial.

PUTTING YOUR MONEY WHERE YOUR VALUES ARE. PERIOD.

Privacy Notice

All providers of personal financial services are now required by law to inform their clients of their policies regarding privacy of client information. The following is a description of the steps we take to protect the privacy of the financial information we receive in conjunction with the management and administration of your investment accounts.

Types of Non-public Personal Information Used

When you apply for, open, or maintain an account with us, we collect the following types of information:

Information provided by you on account applications and other standard forms. This information includes, but is not limited to, your name, address, telephone number, Social Security number, date of birth, annual income, employment status, and citizenship.

Information obtained when verifying the information you provide on applications or other forms (such as from current and past employers or other institutions where you conduct financial transactions).

We are required to maintain account balances for the accounts we manage and to report these to you at least quarterly. As part of this activity, we also maintain certain items of non-public personal information necessary for the management of your accounts and reporting your investment results.

Parties to Whom We Disclose Information

For current and former clients, we do not disclose any non-public personal information obtained in the course of managing your accounts except as permitted by law. Permitted disclosures include, for instance, providing information to our employees, which is necessary in providing services for you. Additionally, we provide nonpublic personal information to any third party or sub-advisors that have been assigned management of your account or authorized by you to provide such services. In all situations we stress the confidential nature of the information. The personal nonpublic information obtained in this process will only be provided to nonaffiliated companies who custody or manage your assets, prepare statements and transaction confirmations for your account.

In certain circumstances, Revo Financial LLC will disclose nonpublic personal information when permitted or required by law or to cooperate with regulators or law enforcement authorities. These parties include government/regulatory agencies, such as the Internal Revenue Service (IRS) and the Securities and Exchange Commission (SEC), as well as any of the federal and state securities regulatory agencies we are registered with and to parties under court order or subpoena that request this information. We are also permitted to make disclosures to third parties per your request, direction, or authorization.

Protecting Confidentiality and Security of Client Information

We maintain internal standards and procedures to protect your information and prevent its dissemination to unaffiliated individuals and entities. We restrict access to nonpublic personal information about you to those employees, registered representatives or agents, and other parties who must use that information to provide products and services to you. We have physical, electronic, and procedural safeguards in compliance with applicable laws and regulations to guard your nonpublic personal information. We require that those nonaffiliated companies who perform services on our behalf, including those who custody your assets, prepare statements and transaction confirmations for your account or provide credit reporting information agree to, and implement physical, electronic, and procedural safeguards to keep your information confidential.

Obtaining Copies of Revo Financial, LLC Privacy Notice or ADV

The most recent version of the Privacy Notice or ADV can be obtained by calling our home office. Please also call us if you have any questions after reading this Privacy Notice or if your financial situation has changed since we last met. Our contact phone number is (918) 336-7877.