Privacy Policy

Green Newton Jamison ("GNJ Wealth") is committed to client confidentiality and the protection of your privacy. The following information is provided, as required by law, to help you understand our privacy policy and how we will handle and maintain confidential personal information as we fulfill our obligations to protect your privacy. "Personal information" refers to the nonpublic financial information obtained by GNJ Wealth in connection with carrying out our services.

Information We Collect

GNJ Wealth collects personal information as part of our relationship with you, to provide client services and fulfill legal and regulatory requirements. The type of information GNJ Wealth collects may include:

- Information GNJ Wealth receives from you on forms (such as name, address, Social Security number, profile documents, assets and income);
- Information you provide GNJ Wealth directly about your personal finances or personal circumstances or which GNJ Wealth may receive from brokerage statements or other information you authorize GNJ Wealth to receive.

Information Disclosed In Administering Products and Services

GNJ Wealth will not disclose personal information about current or former clients to non-affiliated third parties except as permitted or required by law. GNJ Wealth does not sell any personal information about you to any third party. GNJ Wealth will not disclose personal information without your authorization, except as required or permitted by law.

Your Choice to Limit Marketing By Our Affiliate(s)

You may limit our affiliates from marketing their products or services to you based on information that we share with them, such as your income and your account history. Your decision to limit marketing offers from our affiliates will apply for 5 years. Once that period expires, you will be allowed to extend your decision. This limitation does not apply in certain circumstances, such as if you currently do business with one of our affiliates or if you ask to receive information or offers from them.

Procedures to Protect Confidentiality and Security of Your Personal Information

GNJ Wealth has procedures in place that limit access to personal information to those employees who need to know such information in order to perform business services. In addition, GNJ Wealth maintains physical, electronic and procedural safeguards to guard your nonpublic personal information.

GNJ Wealth will update its policy and procedures when necessary to ensure that your privacy is maintained and that GNJ Wealth conducts business in a way that fulfills our commitment to you. If GNJ Wealth makes any material changes in its privacy policy, we will make that information available to clients through our Web site and/or other communications.

Thank You

At GNJ Wealth, your business is important to us and we do our best to safeguard your financial assets and personal information about you. If at any time you have questions about our Privacy Policy or ADV, please contact our Chief Compliance Officer, Steven Jamison, at (503) 391-1040 or write to us at 2150 Commercial Street SE, Suite 200 Salem, Oregon 97302.