



Oregon Pacific
Financial Advisors, Inc

OREGON PACIFIC FINANCIAL ADVISORS PRIVACY POLICY 2020

Maintaining the trust and confidence of our clients is a high priority. That is why we want you to understand how we protect your privacy when we collect and use information about you, and the steps that we take to safeguard that information.

Information we collect: In connection with providing investment products, financial advice, or other services, we obtain nonpublic personal information about you, including:

- Information we receive from you on account applications;
- Information about your transactions with us or others, including your financial advisor; and
- Information received from credit or service bureaus or other third parties.

Information we disclose: We will not disclose information regarding you or your account with us, except under the following circumstances:

- To your authorized representative;
- To establish or maintain an account with an unaffiliated third party, such as a clearing broker providing services to you and/or Oregon Pacific Financial Advisors, Inc.;
- To government entities or other third parties in response to subpoenas or other legal process as required by law;
- To the Broker/dealer of our investment advisory representatives, United Planners Financial Services of America, or their affiliates, to the extent permitted by law;
- As authorized by client with written permission.

Our security policy: Only those individuals who need it to perform their jobs are authorized to have access to confidential client information. We maintain physical, electronic and procedural security measures that comply with applicable state and federal regulations to safeguard confidential client information.

Closed or inactive accounts: If you decide to close your account(s) or become an inactive customer we will adhere to the privacy policies and practices as described in this notice.

Changes to this privacy policy: If we make any substantial changes in the way we use or disseminate confidential information, we will notify you.

If you have any questions concerning this Privacy Policy, please contact
Oregon Pacific Financial Advisors, Inc. at (541) 772-1116.

Securities offered through United Planners Financial Services (UP), Member FINRA/SIPC. Advisory Services offered through Oregon Pacific Financial Advisors, Inc. (OPFA). OPFA and UP are independent companies.