

Privacy Policy

This notice is to the current and prospective clients of Mendel Money Management, Inc.

Maintaining the privacy of your personal information is of utmost importance to us. Although we must maintain certain information about you that we collect from account applications that you complete and your communications with us, it is our policy not to disclose your personal information to third parties except as permitted by law or as requested by you. We do share your information with non-affiliated service providers (i.e., broker-dealers, independent custodians and transfer agents) so that we can provide you with advisory services; however, these service providers are prohibited from using that information for purposes other than assisting us in providing advisory services to you. We also restrict access to nonpublic personal information to those employees who need to know that information in order to provide services to you. We maintain physical, electronic and procedural safeguards that meet or exceed federal standards to guard your nonpublic personal information.

You are welcome to contact Barry Mendel at Mendel Money Management with any questions regarding the Privacy Policy.

We reserve the right to revise our Privacy Policy, but we will not do so without notice to you.