



DORFMAN
VALUE INVESTMENTS

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Privacy Policy

We do not disclose nonpublic personal information about our clients or former clients to third parties, other than as described below.

We collect information about you (such as your name, address, Social Security number, account number, assets and income) from our discussions with you, from documents that you may deliver to us and in the course of providing advisory services for you.

We may use this information to provide advisory services to you, to open an account for you, to process transactions for your account or otherwise in the course of our business.

The information will be stored, for our own use, on Google Drive and Salesforce. For our own use and that of our custodial brokers, the information will also be stored on the web site of your custodial broker.

In order to service your account and buy or sell securities for you, we may provide your personal information to firms that assist us in servicing your account and have a need for such information, such as a broker or fund administrator.

We may also provide information about you to our attorneys, accountants and auditors, in order that they may properly conduct their services.

We do not otherwise provide information about you to outside firms, organizations or individuals, except as required by law.

We never sell information about you to outside parties.

We maintain physical, electronic and procedural safeguards that comply with applicable federal and state standards to safeguard your personal information.

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