

Harvey Financial Management Company, LLC

Privacy Statement

Rev. January 2021

FACTS

WHAT DOES HARVEY FINANCIAL MANAGEMENT COMPANY, LLC DO WITH YOUR PERSONAL INFORMATION?

Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	The types of personal information we collect and share depend on the products or service you have with us. The information can include: <ul style="list-style-type: none">▪ Contact information▪ Social Security number▪ Income▪ Net Worth
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reason financial companies can share their customers' personal information; the reasons Harvey Financial Management Company, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Harvey Financial Management Company, LLC share?	Can you limit this sharing?
For our everyday business purposes		
To process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus.	Yes	No
For our marketing purposes		
To offer our products and services to you.	No	No
For joint marketing with other financial companies	No	No
For our affiliates' everyday business purposes		
Information about your transactions and experiences.	No	No
For our affiliates' everyday business purposes		
Information about your creditworthiness.	No	No
For our affiliates to market to you	No	No
For nonaffiliated to market to you	No	No

Who we are	
Who is providing this notice?	You are receiving this notice from Harvey Financial Management Company, LLC.
What we do	
How does Harvey Financial Management Company, LLC protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does Harvey Financial Management Company, LLC collect my personal information?	We collect your personal information, for example, when you: <ul style="list-style-type: none"> ▪ open an account ▪ Provide account information or give us contact information
Why can't I limit all sharing?	Federal law gives you the right to limit only: <ul style="list-style-type: none"> ▪ sharing for affiliates' everyday business purposes - information about your creditworthiness ▪ affiliates from using your information to market to you ▪ sharing for nonaffiliated to market to you
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ Harvey Financial Management Company, LLC has no affiliates.
Nonaffiliated	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ Harvey Financial Managements Company, LLC does not share information with nonaffiliated companies.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ▪ Harvey Financial Management Company, LLC has no joint marketing agreements with nonaffiliated financial companies.

Questions?Call (406) 539-0252 or go to harveyfinancialmgt.com