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Privacy Policy

At Talley, French & Kendall, P.C. ("the Firm"), we will keep your confidential information confidential. This memo outlines our privacy policy. Unless you give us permission to reveal confidential information, we will not do so except as required by law. Without your permission, we will not even share information that may be available from public sources.

WHAT TYPE OF NONPUBLIC PERSONAL INFORMATION DO WE COLLECT?

The nonpublic personal information that we collect relating to individual clients will vary with the purpose and scope of our representation. Because we are trust and estate attorneys, it is common for us to ask for personal financial information, such as:

1. Asset information and your goals and desires relating to its ultimate distribution;
2. Your birth date and social security number;
3. Information regarding family members and family relationships;
4. Information regarding your other advisors;
5. Tax information, including gift and estate taxes.

You may decline to provide us with any confidential information, but, if you do, any legal advice and counsel will be based on general assumptions, rather than on your specific circumstances.