



PRIVACY POLICY

WHAT IS OUR COMMITMENT TO YOU?

Balance Business Solutions, Inc. (“Balance Business”) and its affiliates are committed to maintaining the trust and confidence of our clients. We want you to understand how we protect your privacy when we collect and use information about you and your business, and the measures we take to safeguard that information. Keeping client information secure and private is a priority for us. The following describes our Privacy Policy. In the case a plural such as “us”, “we”, or “our” is used, it refers to Balance Business and any affiliates. Please take a moment to review it and feel free to contact us with any questions. Thank you for the trust you have placed in us.

WHAT TYPES OF NON-PUBLIC PERSONAL & BUSINESS INFORMATION DO WE COLLECT ABOUT YOU?

In the course of providing service to you, we collect nonpublic business information about your business from the following sources:

- Information from you about the business on the business appraisal questionnaire and other standard forms (Ex.: list of shareholders and number of shares owned, shareholder contact information);
- Information obtained from financial statements, tax returns, etc. (Ex.: depreciation schedules, aged receivables, and aged payables);
- Information we receive from consumer reporting agencies;
- Information obtained when verifying the information you provide on applications or other forms.

HOW DO WE PROTECT THE CONFIDENTIALITY AND SECURITY OF YOUR NON-PUBLIC PERSONAL INFORMATION?

Keeping your information secure is one of our most important responsibilities. We restrict access to nonpublic personal information about you to those employees and agents who need to know that information in order to provide services to you. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic personal information.



DO WE DISCLOSE TO ANY NON-AFFILIATED THIRD PARTIES YOUR NON-PUBLIC PERSONAL INFORMATION?

We do not sell, share or disclose your non-public personal information to non-affiliated third party marketing companies.

We may also disclose nonpublic personal information about you under circumstances as permitted or required by law. These disclosures typically include information to, conduct our operations, and follow your instructions as you authorize, or protect the security of our financial records.

DO WE DISCLOSE WITHIN OUR FAMILY OF AFFILIATED COMPANIES YOUR NON-PUBLIC PERSONAL INFORMATION?

Non-public information that is obtained by Balance Business will not be disclosed to our affiliated companies.

WHAT IS OUR POLICY RELATING TO FORMER CLIENTS?

If you decide to become an inactive client, we will adhere to the privacy policies and practices as described in this notice. We reserve the right to change this policy at any time and you will be notified if any changes occur.

If you have any questions after reading this Privacy Policy, please contact us by writing to Balance Business Solutions, Inc., Privacy Management, 2503 Fox Run Parkway, Suite 4, Yankton, SD 57078.

This Privacy Policy applies to clients and former clients of Balance Business Solutions, Inc.

Matthew D. Stone

Date