



## PRIVACY POLICY NOTICE

### **Policy**

Bedel Financial Consulting, Inc. makes every effort to maintain complete confidentiality of all client matters. All personal and financial information received from the client for the purpose of providing financial planning or investment management is held in strict confidence. We do not disclose the nonpublic personal information we collect about our clients to anyone except: (i) in furtherance of our business relationship and then only to those persons necessary to effect the transactions and provide the services that the customer authorizes (such as broker-dealers, custodians, independent managers, etc.); (ii) to persons assessing our compliance with industry standards (e.g. professional licensing authorities, etc.); (iii) our attorneys, accountants, and auditors; or (iv) as otherwise provided by law.

Only as necessary and as permitted by law, we disclose the nonpublic personal information about our customers to governmental agencies (such as SEC) and other third parties in certain circumstances (such as technology or marketing services) on our behalf. These third parties sign confidentiality agreements that prohibit the use or sharing of the information for any other purpose.

### **Procedures**

With respect to the personal and financial information that a client provides, our procedure is as follows:

- To further provide protection and privacy for our clients, at the end of each day all of our filing cabinets are locked and the keys for these cabinets are secured in another location. All computers are locked, logged off or turned off at the end of the day and are not accessible unless the proper password is indicated.
- We collect data from our clients based upon their financial planning and investment management needs. In providing services to our clients, it may be necessary to discuss personal and financial information with third parties such as insurance professionals, brokerage service personnel, attorneys, or other professional advisors. Sharing of such information will not be done without written or verbal permission from the client.
- We do not provide our client's personal information to vendors or solicitors for any purpose.
- Before working with third party contractors, they must sign a contractual confidentiality agreement.

Bedel Financial Consulting, Inc. values the trust of our clients and wants to carefully handle all information in its possession.



# BEDELFINANCIAL

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### What You Can Do

For your protection, we recommend that you keep your account information and log in credentials confidential. If you become aware of any suspicious activity related to your accounts, please contact us immediately in accordance with the “Contacting Us” section below.

### How You Can Access, Change or Suppress Your Personal Data

If you would like to review, correct, update, suppress, restrict or delete Personal Data that you have previously provided to us, or if you would like to receive an electronic copy of your Personal Data for purposes of transmitting it to another company (to the extent this right to data portability is provided to you by law), you can contact us in accordance with the “Contacting Us” section below.

In your request, please make clear what Personal Data you would like to have changed, whether you would like to have your Personal Data suppressed from our database, or other limitations you would like to put on our use of your Personal Data. For your protection, we only fulfill requests for the Personal Data associated with the particular email address that you use to send us your request, and we may need to verify your identity before fulfilling your request. We will try to comply with your request as soon as reasonably practicable.

Please note that we often need to retain certain data for recordkeeping purposes to fulfill our legal obligations to which we are subject. Therefore, federal and/or state securities laws require us to keep records for a certain period of time before we can delete them.

### We Will Keep You Informed

If our Privacy Policy is expected to change, we will notify you in advance. Your custodian has provided a copy of their Privacy Policy to you in a separate mailing. You may lodge a complaint with a data protection authority for your country or region or where an alleged infringement of applicable data protection laws occurs at [http://ec.europa.eu/newsroom/article29/item-detail.cfm? item\\_id=612080](http://ec.europa.eu/newsroom/article29/item-detail.cfm? item_id=612080).

### Contacting Us

Email: [bedel@bedelfinancial.com](mailto:bedel@bedelfinancial.com)

Office: 317-843-1358

8940 River Crossing Boulevard, Suite 120

Indianapolis, IN 46240



## WEBSITE VISITORS

Bedel Financial Consulting, Inc. makes every effort to maintain complete confidentiality of all website visitor's information and electronic data. We do not sell any information received.

### Collection of Data

Our site uses the technology of third-party partner NextRoll to help us recognize your device and understand how you use our site(s) so that we can improve our services to reflect your interests and serve you advertisements about the services we provided that are likely to be of more interest to you. Specifically, NextRoll collects information about your activity on our site(s) to enable us to measure and analyze traffic and browsing activity on our site(s). Here is more information as to what is collected, how that data is used and also, how to opt out. You can control the collection of your data by web browsers and mobile devices by navigating to the settings feature in your browser and declining all third party cookies or declining third party cookies from specific sites, or, for mobile, limiting ad tracking or resetting the advertiser identifier via the privacy settings on their mobile device. You can also see the opt-out links provided below.

### The Data We Collect

The AdRoll Pixel collects the following types of data on any page where the pixel loads: HTTP headers: Headers are sent by default from a user browser to any server request. They include some basic data like IP address, user agent (which includes information like browser model and version), the referrer (URL of the page that linked to the page the user is visiting, if any), and the URL of the page the user is visiting. Advertiser specific data: These are 2 values (advertisable ID and pixel ID) that we use to identify the account of the site's owner in our system. Site Activity: User actions taken while navigating web pages that have our pixel. User identifier: Each browser gets a unique NextRoll identifier (cookie ID) so we can recognize that browser. Additional optional values: Marketers can optionally choose for NextRoll, Inc. to collect additional data through the AdRoll Group Pixel for some specific use cases. For example: User email addresses: either in hashed form for connecting the same user across devices, or in clear text for reporting purposes such as creating a report of all users that convert after interacting with ads. Order ID or conversion values, for more actionable reporting on what transactions your campaigns drove. Product ID, for allowing us to show ads of specific products a user has viewed. Our third-party partner, NextRoll collects hashed email addresses from our visitors for the purposes of cross device tracking and the use of AdRoll email.

### What we do with the data

NextRoll, Inc. provides targeted advertising services for advertiser clients ("Advertisers"). The AdRoll Group platform uses cookies, tracking pixels and related technologies to provide our services for Advertisers. When someone visits a website operated by an Advertiser or a third party site where NextRoll, Inc. could serve an ad, NextRoll, Inc. may collect some or all of the data described in our Service Privacy Notice, in order to enable NextRoll, Inc. to do cookie matching. The NextRoll platform uses that data as well as other data to help advertisers serve relevant ads to their customers.

No mobile information will be shared with third parties/affiliates for marketing or promotional purposes. All the above categories exclude text messaging originator opt-in data and consent; this information will not be shared with any third parties.



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## WEBSITE VISITORS

### Opting-Out

Our partners at NextRoll may use non-cookie technologies that may not be impacted by browser settings that block cookies. Your browser may not permit you to block such technologies. For this reason, you can use the following third party tools to decline the collection and use of information for the purpose of serving you interest based advertising:

- The NAI's opt-out platform: <http://www.networkadvertising.org/choices/>
- The EDAA's opt-out platform <http://www.youronlinechoices.com/>
- The DAA's opt-out platform: <http://optout.aboutads.info/?c=2&lang=EN>

### Opting-Out: Cross-device site advertising

To opt out of cross-device site advertising, visit the NAI Mobile Devices platform: <https://www.networkadvertising.org/mobile-choice/#ios7>

### NextRoll Privacy Notice for California Resident's

<https://www.nextroll.com/privacy#service-13>