

Bradyco Financial GDPR Privacy Policy – May 2018

This Privacy Policy covers how Bradyco, Inc. dba Bradyco Financial and Bradley F. Richardson, its sole employee, collects, uses, discloses, transfers, and stores your information.

I collect personal information used to fill out and submit applications on your behalf with the custodian that holds your investments, Charles Schwab & Co. This may include your name, address, telephone number, e-mail address, date of birth, your Mother's maiden name, past investment account activity, passport number, your tax ID number, and any other similar information required by Schwab. I collect this information for the sole purpose of providing investment management services to you.

I do not disclose any personal information I collect about my clients or former clients to anyone other than in connection with the administration, processing and servicing of client accounts or to my accountants, attorneys and auditors, or otherwise as required by law. It may be necessary – by law, legal process, litigation, and/or requests from public and governmental authorities within or outside your country of residence – for Bradyco Financial to disclose your personal information. Additionally, in the event of a reorganization, merger, or sale I may transfer any and all personal information I have collected to the relevant third party, but only with your express written consent.

I have taken all prudent measures to restrict access to personal information that I collect about you. To that end, I maintain physical, electronic and procedural controls in keeping with industry standards to safeguard your nonpublic personal information. If you request that I delete data you previously supplied to me, I will do so in a timely and safe manner to the degree allowed by the laws of the United States of America and its states.

If you believe that any information I am holding on you is incorrect or incomplete, please write to or email to me as soon as possible. I will promptly correct any information found to be incorrect.

Bradyco Financial does not use “cookies” on its website.

I reserve the right to change this Notice, and to apply changes to information previously collected, as permitted by law. I will inform you of any changes as required by law.

If you have any questions or concerns regarding this policy, please contact me (Bradley F. Richardson at 617-945-1991).