Lakeland Investment Advisors
PRIVACY POLICY

January 1, 2020
Information is the cornerstone of our ability to offer excellent service and Lakeland Investment Advisors recognizes that our most important asset is our clients' trust. We respect your right to keep your personal information confidential and to avoid unwanted solicitations. Investment advisors have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy.

Types of non-public personal information we may collect.
We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization. This may include:
-Information received on account applications.
-Information received from other financial institutions.
-Information that is provided on account statements or other documents that you provide to us.

Parties to whom we may disclose information.
For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, our Custodian (First Clearing, LLC.), and in limited situations, to unrelated third parties who need to know certain information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

Protecting the confidentiality and security of current and former clients' information.
We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards. Our custodian also adheres to the same privacy standards and safeguards stated herein.
Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us. Communication between the firm and our custodian (Trade PMR) is done via a private portal that is not public or accessible to the public.

Please do not hesitate to contact us for further information

Lakeland Investment Advisors
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