

# PRIVACY DISCLOSURE DOCUMENT

A primary client goal of Valeo Financial Advisors, LLC is to protect your privacy.

To conduct regular business, we may collect nonpublic personal information from sources such as:

- Information reported by you on applications or other forms you provide to us
- Information about your transactions with us, our affiliates, or others

As the Firm shares nonpublic information solely to service our client accounts, we do not disclose any nonpublic personal information about our customers or former customers to anyone, except as permitted by law.

- Information the firm receives from clients on applications (name, social security number, address, assets, etc.)

At times, we may disclose nonpublic personal information to affiliated or nonaffiliated third parties. We may share any of the information that we collect as described above. We may disclose nonpublic personal information about you to the following types of affiliated or nonaffiliated third parties:

- Financial service providers such as broker dealers, insurance companies, or mortgage brokers

## **Information Safeguarding**

Valeo will internally safeguard your nonpublic personal information by restricting access to only those employees who provide services to you or those who need access to your information to service your account. In addition, we will maintain physical, electronic and procedural safeguards that meet federal and/or state standards to guard your nonpublic personal information.

## **For questions or concerns, please write to:**

Chief Compliance Officer  
Valeo Financial Advisors, LLC  
630 W. Carmel Dr., Suite 130  
Carmel, IN 46032