

Gilbert Capital Group

Privacy of Your Financial Information

Gilbert Capital Group is committed to the privacy and confidentiality of the information provided to us by our current and former clients. In compliance with Gramm-Leach-Bliley Act of 1999, we are required to disclose the sources and uses of nonpublic personal information.

Our clients provide nonpublic personal information to us by application for brokerage services, in personal conferences for investment planning purposes, to complete a transaction or request for service, and from their designated representatives, such as attorneys and accountants.

In addition to the information disclosed to us, we keep records of all transactions executed in those brokerage accounts designated by our clients as managed by Gilbert Capital Group.

Information retained by Gilbert Capital Group is used to provide personal and effective investment management services to our clients. This information may not be used for any other purpose.

Gilbert Capital Group restricts access to our clients' personal and account information and maintains physical, electronic, and procedural safeguards to protect this nonpublic personal information.

Gilbert Capital Group does not share nonpublic personal information with anyone except at our clients' request.

***Experience you can trust,
Attention you deserve.***