

Privacy Statement

Cedar Crest Advisors, LLC (“CCA”) collects non-public personal information about its clients from applications and other forms as well as from oral and e-mail communications. CCA may also receive information from consumer reporting agencies.

We collect personal information (such as your name, address, social security number, assets and income) from our discussions with you and from documents that you may deliver to us in the course of our providing services to you. We may use this information to assist in the normal course of our business. In order to service you and assist in affecting your transaction(s), we may provide your personal information to firms that assist us in servicing your account(s) and have a need for such information, as permitted by law. We may also disclose such information to service providers that agree to protect the confidentiality of your information and to use the information only for the purposes for which we disclose the information to them.

If you prefer that we do not disclose non-public, personal information about you to non-affiliated third parties, you may opt out of those disclosures. That is, you may direct us not to make those disclosures available (other than disclosures permitted by law). If you wish to opt out of disclosures to non-affiliated third parties, kindly make your request in writing to us at the following address:

Cedar Crest Advisors, LLC
1253 Worcester Rd., Suite 403
Framingham, MA 01701

We restrict access to non-public personal information about our clients to those representatives and employees who need to know such information to provide products or services to you. CCA maintains physical, electronic, and procedural safeguards that comply with federal standards to guard your non-public personal information.