

Privacy Policy

CIGX, our affiliates, and the entire securities industry go to great lengths to protect the privacy of client's personal financial information. We must know about our client's financial situation and goals, as well as their personal situation to make the most suitable recommendations.

We must be able to share information within our firm and with our affiliates to effectively serve our customers. Beyond that, we do not share any of your personal and financial information with anyone at any time.

In order to facilitate the servicing of your account, CIGX will obtain information via the data gathering form, which will include your name, address, social security number, date of birth, income, and assets. CIGX will also request account statement and other paperwork relevant to the planning or asset management process.

This information will remain secure in client files or stored online in password protected programs or files.