



BCM Advisors, LLC

1018 Harding St., Suite 104
Lafayette, LA 70503
337-233-7758

PRIVACY STATEMENT

BCM Advisors, LLC ("BCM") is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us.

As part of the advisory services performed by BCM, certain client information is received and maintained by BCM that meets the definition of "non-public personal information" under the SEC and FTC Regulations. The non-public personal information that we collect includes: *personal and business financial profiles, identification information, information needed for the financial planning process, information about transactions between you and third parties, and information provided to us by other advisors.* BCM does not have an affiliate with which it shares information. We do not disclose nonpublic information to nonaffiliated third parties, except 1) as necessary to provide the service that you requested or authorized, or to maintain and service your account; 2) to the extent reasonably necessary to prevent fraud and unauthorized transactions; 3) as permitted or required by law; or 4) after first advising you of the change in firm policy.

With your permission, we disclose limited information to attorneys, accountants, lenders, and others with whom you have established a relationship. You may **opt out** from our sharing information with nonaffiliated third parties by notifying us at any time by telephone, mail, fax, email, or in person. With your permission, we share a limited amount of information about you with your brokerage firm in order to execute securities transactions on your behalf. We require strict confidentiality in our agreements with unaffiliated third parties that require access to your personal information, including financial service companies, consultants, software vendors, and auditors. Federal and state regulators may review firm and client records as permitted by law. We limit staff and employee access to information only to those who have a business or professional reason for knowing such information for the purpose of performing their respective duties, and only to nonaffiliated parties as permitted by law.

We maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk.

We do not provide your personal information to mailing list vendors or solicitors.

Personally identifiable information about you will be maintained while you are a client, and for the required period thereafter that records are required to be maintained by federal and state securities laws. After that time, information may be destroyed.

We will notify you in advance if our privacy policy is expected to change. We are required by law to deliver this *Privacy Statement* to you annually, in writing.

Revised March 2024