

Privacy Policy for Creed Evans Financial Advisory, LLC

Last Updated: September 22, 2025

This Privacy Policy explains how Creed Evans Financial Advisory, LLC (“Creed Evans Financial”) and its affiliates collect, use, disclose, and protect your personal information in connection with our services. We are committed to safeguarding your privacy and maintaining the security of your personal data.

Who and When This Privacy Policy Applies To

This policy applies when you visit our website, engage our services as a client, or interact with us as a prospective or former client. By accessing or using our services, you acknowledge and agree to the practices described in this Privacy Policy.

Please note that this policy does not apply to third-party websites, services, or organizations that are not affiliated with Creed Evans Financial. We do not control the privacy practices of those third parties and encourage you to review their privacy policies before providing them with your information.

Information We Collect

We collect information about you when you access or use our services, provide information directly to us, or authorize third parties to share information with us. We may also obtain publicly available information about you, as permitted by applicable law.

Personal Information

We may collect information that can identify you or your device, including—but not limited to—your name, email address, physical address, and IP address. This information may be collected when you visit our website, contact us, or inquire about our services.

Nonpublic Personal Information

To provide the services you request and as permitted by applicable law, we may collect nonpublic personal information such as your Social Security number, driver’s license number, financial account numbers and balances, and—in cases involving insurance services—non-public health information.

This information may be collected through meetings, conversations, or correspondence with you, as well as from applications and forms you submit.

We may also receive information about your investments or transactions from third parties, such as recordkeepers, custodians, or investment managers.

How Do We Use Your Information?

Creed Evans Financial collects and uses your personal information to provide and manage the services you request. We also use this information for our internal business purposes, such as administering accounts, analyzing service usage, and enhancing the quality and effectiveness of our offerings. Additionally, we may use your contact information to send you updates, insights, or information we believe may be relevant or of interest to you.

How Your Information Is Shared

Creed Evans Financial may share your personal information, as permitted by law, with affiliated entities, including both financial and non-financial institutions. We may also share your information with non-affiliated third parties, such as service providers that perform functions on our behalf—including data processing, analytics, marketing, and customer support. These service providers are evaluated for their information security practices and are contractually obligated to maintain the confidentiality of your information and to use it solely for the disclosed purposes.

Creed Evans Financial does not sell your personal information. We disclose nonpublic personal information only for our everyday business purposes—such as processing transactions, maintaining your accounts, or as otherwise permitted or required by law.

We may also share your information:

- With your prior written consent;
- In connection with corporate business transactions (e.g., mergers, acquisitions, or asset sales);
- To comply with legal obligations, such as:
 - A valid court order or regulatory authority request (e.g., FINRA);
 - When reasonably necessary to enforce our legal rights in a dispute.

How Your Information Is Protected and Retained

We use a combination of physical, technical, and administrative safeguards to protect your personal information from loss, unauthorized access, use, alteration, and disclosure. These measures include advanced security technologies such as encryption, firewalls, private networks, and electronic monitoring and response systems. We also implement access controls to restrict personal information to authorized personnel only. Prospective employees undergo background screening, including checks for criminal convictions. Additionally, we require third-party service providers to agree contractually to use personal information solely for the purposes for which it was provided and to maintain appropriate security measures.

Access to and Correction of Information

You have the right to request access to, and correction of, the personal information we hold about you. These rights are subject to applicable exceptions and the laws of your jurisdiction. To exercise your rights, please submit a request using the contact information provided in the “Contact Us” section below. We will respond to your request within forty-five (45) days.

Information on Children

Our website and services are not intended for children, and we do not knowingly collect, use or disclose information about children under the age of sixteen (16).

Use of Website Technologies

At Creed Evans Financial, we use cookies and pixels to improve website functionality, enhance performance, prevent fraud, and simplify registration processes.

Cookies are small data files stored on your device by your web browser when you visit a site. These cookies allow us to remember your preferences, recognize you on return visits, and provide a more personalized experience.

In addition to cookies, we may use pixels—small code snippets embedded on our site. Pixels help us analyze how you use our site, spot trends, and identify areas where we can improve your browsing experience.

We also use a cookie consent manager to give you control over the cookies and pixels used. When you first visit our website, you’ll be prompted to manage your cookie preferences. By continuing to browse and accepting cookies via

the consent manager, you agree to our use of these technologies to enhance your experience.

Do Not Track Signals

Some modern web browsers offer a “Do Not Track” (DNT) setting that sends a signal to websites indicating that you prefer not to have your online activities tracked. At this time, we do not respond to DNT signals because there is no consistent industry standard for how such signals should be interpreted.

Privacy Policy Updates and International Use

We may update this Privacy Policy at any time. When changes are made, we will revise the “Last Updated” date at the top of this page. If required by law or if we believe it is appropriate, we will also provide additional notice, such as sending you a notification.

The examples provided in this Privacy Policy are for illustrative purposes only and are not meant to be comprehensive.

If you access our website from outside the United States, you acknowledge that your use is governed by this policy. You also understand that your personal information may be transferred to and processed in a country that may not offer the same level of data protection as your own jurisdiction.

Contact Us:

Questions regarding this policy or your rights regarding your personal information at Creed Evans Financial can be sent to creed@creedevansfa.com or 276-708-7084.