

O'REILLY & O'REILLY BUSINESS SERVICES INC.

Leo P. O'Reilly
Owner

August 26, 2025

Client Privacy Policy

POLICY STATEMENT

O'Reilly & O'Reilly Business Services, Inc. is dedicated to maintaining high standards of client confidentiality. We recognize that our clients provide us with private financial and personal information and we are committed to maintaining the confidentiality of that information. We will not compromise established relationships with our clients by disclosing personal information about our clients to any third party for independent use without our clients' prior written consent, except as required by law. Our clients are not only protected by federal and state laws, but also by our firms' unwavering commitment to our Client Privacy Policy.

COLLECTION OF CLIENT INFORMATION

O'Reilly & O'Reilly Business Services, Inc. does not collect or retain any client information unless it has a legitimate purpose for doing so (e.g., to deliver the service or product for which you have engaged us). The information we collect may include contact information (e.g., address), identification information (e.g., social security number and date of birth), and other income and financial information. We may receive information from you in a variety of ways, including the following:

- Information we receive directly from you on applications or other forms (e.g., tax returns); and
- Information we receive from your other advisors whom you have directed to provide relevant information to us.

DISCLOSURE OF CLIENT INFORMATION

O'Reilly & O'Reilly Business Services, Inc. does not disclose nonpublic personal information about its clients or former clients to affiliated or nonaffiliated third parties, except as required by law. We restrict access to nonpublic personal information about our clients to those employees who need to know that information to provide products or services to you. In addition, we maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic personal information.

If you have any questions about the disclosure of your personal information to third parties please give me a call.