

Dorval Corporation- Minnesota Nurses Association (MNA) Agreement
Our Privacy Policy Statement

We respect the privacy of all Minnesota Nursing Association (MNA) members we meet with both past and present (collectively termed “customers” per federal guidelines). It is recognized that members have entrusted our firm with non-public personal information, and it is important that both access persons and customers are aware of firm policy concerning what may be done with that information.

We collect personal information about MNA members who meet with us from the following sources:

- Information they provide to us to complete their financial plan or investment recommendation;
- Information they provide to us in agreements, account applications, and other documents completed in connection with the opening and maintenance of any accounts; and/or
- Information they provide to us orally.

We do not sell, rent or otherwise disclose personal information collected by our site to third parties in the ordinary course of business. If an MNA member decides to engage in an investment-management advisory relationship with us, we may disclose non-public personal information about you to unaffiliated third parties in certain circumstances. For example, in order for us to provide financial planning or investment management services to you, we may disclose your personal information in limited circumstances to various service providers, such as your custodian. Otherwise, we do not disclose nonpublic personal information about our clients to anyone, except in the following circumstances:

- When required to provide services our clients have requested;
- When our clients have specifically authorized us to do so in writing;
- When required during the course of a firm assessment (i.e., independent audit); and
- When permitted or required by law (i.e., periodic regulatory examination).

Within our firm, we restrict access to client information to staff that need to know that information. All personnel and our service providers understand that everything handled in our office is confidential and they are instructed to not discuss client information or situation with someone else unless they are specifically authorized in writing by the client to do so. This includes, for example, providing information to a family member.

To ensure security and confidentiality, we maintain physical, electronic, and procedural safeguards to protect the privacy of client information.

Contact us at:

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