

Privacy Policy

Our Policy

At Pinnacle Trust, the interests of our clients always come first. As part of our company's tradition of trust, the confidentiality of client information has been, and will continue to be, paramount. We maintain high standards to safeguard your personal financial information at all times, and we will remain vigilant in protecting that information.

We collect personal financial information to operate prudently and to meet legal and regulatory requirements. We never rent or sell your name or other personal financial information. We will share certain information with any party not in our corporate family ("nonaffiliated third parties") as permitted by law and for the sole purpose of better servicing your financial needs. The recipients of that information are required to protect the confidentiality and security of that information and may not reuse it for any other purpose.

Questions and Answers about Pinnacle Trust's privacy practices

How do we protect the confidentiality and security of your information?

People. We restrict access to your personal financial information to personnel who need that information to provide you with our products and services. Our employee communications also reinforce our privacy policies.

Policies and Procedures. We maintain and monitor our physical, electronic and procedural safeguards, updating them as needed so that we may guard your personal information.

What information do we disclose to affiliates about you?

We may disclose some or all of your personal information to our corporate insurance affiliate, Pinnacle Insurance Agency, only if you have requested that we pursue insurance solutions for you through that route. This enables us to offer you a broader range of products and services.

What information do we disclose to nonaffiliated third parties about you?

Pinnacle Trust will, as necessary, use various services from nonaffiliated third parties. We use these external service providers for the purpose of supporting the financial services that we provide to you. For example, we provide information to external service providers so that your account statements can be printed and mailed. These parties must agree to comply with stringent security and privacy policies and procedures. Their ability to protect the personal financial information of our clients is an important consideration in our relationship with them.

What information do we disclose about former clients and to whom?

We may disclose some or all of a former client's personal information to government agencies and self-regulatory organizations when permitted or required by law, such as when required to file abandoned property reports and to comply with subpoenas and other official governmental requests.

For questions concerning Pinnacle Trust's Privacy Pledge, please contact us at 601-957-0323.