October 23, 2026

DORVAL & CHORNE Financial Advisors
Quality of Life Planning

Dorval Corporation

Our Privacy Policy Statement

We respect the privacy of all clients and prospective clients both past and present (collectively termed "customers" per federal guidelines). It is recognized that clients 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 our clients from the following sources:

- Information our clients provide to us to complete their financial plan or investment recommendation;
- Information our clients provide to us in agreements, account applications, and other documents completed in connection with the opening and maintenance of their accounts;
- Information our clients provide to us orally; and
- Information we may receive from service providers, such as custodians, about client transactions.

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).

In the event that it is necessary to share your non-public personal information with an unaffiliated third party, we will request that you give us specific permission via a signed statement. Unless this "opt-in" statement is signed, we will not share your information with an unaffiliated third party.

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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