

# ONE DAY IN JULY

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## PRIVACY POLICY

Investment advisers are required by law to inform their clients of their policies regarding privacy of client information. We are bound by professional standards of confidentiality that are even more stringent than those required by law. Federal and state laws give the client the right to limit some but not all sharing of personal information. They also require us to tell you how we collect, share, and protect your personal information.

### TYPES OF NONPUBLIC PERSONAL INFORMATION (NPI) THAT MAY BE DISCLOSED

We collect nonpublic personal information (NPI) about you that is either provided to us by you or obtained by us with your authorization. This can include, but is not limited to, your social security number, date of birth, banking information, financial account numbers and/or balances, and sources of income. When you are no longer our customer, we may continue to share your information only as described in this notice.

### CIRCUMSTANCES UNDER WHICH WE MAY DISCLOSE INFORMATION

All investment advisers may need to share NPI to run their everyday business. In the section below, we list the circumstances under which we may share your NPI:

- To provide information to Affiliates or Non-affiliate service providers needed to process your transactions, maintain your account(s), or respond to your inquiries;
- To persons acting as your legal representatives;
- To provide information to agencies assessing our firm's compliance with industry standards, and to our attorneys, accountant, and auditors;
- To comply with any civil, criminal or regulatory investigations or examinations of our firm; and
- For our marketing, solely to offer our products and services to you.

If you are a new client, we may begin sharing your information on the day you sign our agreement. When

you are no longer our client, we may continue to share your NPI as described in this notice. However, you can contact us at any time to limit our sharing.

### PROTECTING THE CONFIDENTIALITY OF CURRENT AND FORMER CLIENT'S INFORMATION

To protect your personal information from unauthorized access and use, we enter into agreements with our service providers to maintain confidentiality, and use security measures that comply with federal law, including computer safeguards and secured files and building.

### FEDERAL LAW GIVES YOU THE RIGHT TO LIMIT SHARING - OPTING OUT

We currently do not share NPI with parties to whom this paragraph applies.

Solely for your information: federal law allows you the right to limit the sharing of your NPI by "opting-out" of the following: sharing for non-Affiliates' everyday business purposes - information about your creditworthiness; sharing with Affiliates who use your information to market to you; or sharing with non-Affiliates to market to you. State laws and individual companies may give you additional rights to limit sharing.

**DEFINITIONS:** Affiliates - financial and non-financial companies related by common ownership or control. Non-affiliates - financial and non-financial companies not related by common ownership or control.

*Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.*