

# Truepath Financial Privacy Statement

## Our Commitment To Privacy

Truepath Financial has always been committed to maintaining the confidentiality, integrity and security of the personal information entrusted to us by current and prospective clients. Truepath Financial **does not sell** information about current or former clients to anyone and **does not share** personal information with others, except when necessary to implement financial advisory services or at your request, as permitted by law. **Due to our commitment to privacy, it is not necessary for you to do anything to prevent your personal information from being shared.** Please review the following information to learn more about how we collect, share and protect your personal information.

## The Information We Collect About You

We collect personal information to provide fundamental financial guidance, establish and manage accounts and complete transactions on your behalf.

The categories of nonpublic information that we collect from you may include:

- ◆ Information required on applications or forms, such as your name, address, phone, email address, Social Security number, birth date, net worth and income
- ◆ Transactional activity in your account(s) (i.e., trading history and balances)
- ◆ Information about your health to the extent that it is needed for financial guidance
- ◆ Information gathered during interactions with Truepath Financial and Truepoint Capital employees
- ◆ Information about transactions between you and third parties

## How We Use Your Information

Truepath Financial has always considered the protection of sensitive information to be a sound business practice and a foundation of client trust. As emphasized above, we do not sell information about current or former clients or their accounts to third parties. With your permission, we share a limited amount of personal information with your investment custodian in order to execute transactions on your behalf. In addition, with your permission or at your request, we disclose limited information to attorneys, accountants, and other professionals with whom you have established a relationship.

In certain instances, we may contract with non-affiliated companies to perform services for us, for example, Lightport, the host of our website. Where necessary, we will disclose your personal information to these third parties. In all such cases, we limit the information provided to third parties to what is necessary to carry out its assigned responsibilities. And, we require these third parties to treat your private information with the same degree of confidentiality that we do. Federal and state securities regulators may review our firm records and your personal records as permitted by law.

## How We Protect Your Information

We restrict access to private records to Truepath Financial and Truepoint Capital employees who need the information in order to provide advisory services to you. We employ extensive data protection controls to maintain physical, electronic and procedural safeguards to protect your personal information at all times. We maintain a secure office to ensure that your information is not placed at risk. Personal information will be maintained while you are a client and for the required period thereafter by federal and state securities laws. After that time, information will be destroyed.

## What You Can Do

For your protection, we recommend that you provide your account information, user name, or password to a limited group of trusted advisors. If you become aware of any suspicious activity relating to your account(s), please contact us immediately.

## We Will Keep You Informed

As required by federal law, we will notify you of our privacy policy annually in writing. If our privacy policy is expected to change, we will notify you in advance.