

At Freedom Portfolio Services, we are committed to maintaining the privacy of your personal information. We take great pride in ensuring that we safeguard your personal information from unauthorized access. We encourage you to review the following privacy policy to better understand how we protect your information and how we use it to service your account.

Why does Freedom Portfolio Services obtain personal information?

Freedom Portfolio Services obtains personal information from you in order to provide quality service to your account. The information may be used to develop, offer, and deliver products and services; process account transactions; respond to your inquiries; or to fulfill legal and regulatory requirements. Freedom Portfolio Services may collect the following personal information from you:

1. Personal information provided by you through applications and forms. This includes information such as your name, address, e-mail address, phone number, Social Security number, and birth date.
2. Personal information from processing and managing your accounts with Freedom Portfolio Services. Such information includes trading history, balances, assets, and income.
3. Personal information from other sources with your consent. An example of this would be if you decide to transfer positions from other institutions to Freedom Portfolio Services.

When does Freedom Portfolio Services disclose public information about you to other sources?

At Freedom Portfolio Services, we are committed to ensuring the safety of your personal information. Thus, Freedom Portfolio Services may share nonpublic personal information about you to affiliated third parties, unaffiliated service providers, or government agencies only when the disclosure of such information is required to provide better service to you or must be provided in accordance with applicable law.

We may share your nonpublic personal information under the circumstances described above to the following entities:

1. Affiliates, including affiliated service providers (for example, investment advisers and transfer agents)
 2. Unaffiliated service providers (for example, fulfillment companies and securities clearinghouses)
 3. Government agencies and law enforcement officials (for example, for tax reporting or under court order)
- Freedom Portfolio Services does not disclose any nonpublic information about you, except as permitted by law.

If you should ever decide to close your account with Freedom Portfolio Services, we will continue to strictly adhere to the privacy policies and practices described herein.

How does Freedom Portfolio Services keep my personal information secure?

Freedom Portfolio Services stores personal information about clients on password protected computers as well as in locked filing cabinets. Physical access to the building where such information is stored is limited to authorized persons. Visitors to such areas are escorted by authorized personnel at all times. Only employees of Freedom Portfolio Services shall have access to your personal information and only for the limited purpose of ensuring quality service is provided to you.