

# **Personal Investment Management, Inc.**

## **Privacy Policy Statement**

Thank you for reviewing our privacy commitment to you. Your privacy is of the utmost importance to us. Under federal law, you have the right to know what information is being collected about you and how that information will be used.

In the normal course of business, Personal Investment Management, Inc. (“we”) collects nonpublic personal information about you. Such information may include your name, address, date of birth, Social Security number, assets and income information. We collect this information from account applications or other forms and from telephone or in-person interviews.

We do not disclose any nonpublic personal information about our clients (including prospective and former clients) to anyone, except as required or permitted by law. We do not sell personal information about our clients for solicitation or any other purposes. The information that we collect may be shared with companies such as investment service providers or other vendors or affiliates in order to perform support services on your behalf and as necessary to effect, administer, or process transactions in your account, or for maintaining and servicing your account.

We strictly limit access to nonpublic personal information about you, to those employees who require the information in order to provide services or products to you and to otherwise service your account. We maintain physical, electronic and procedural safeguards that comply with federal standards, to protect your nonpublic personal information.

This notice pertains to any and all financial accounts that PIM manages on your behalf.

If you have any questions about our privacy policy, please call our office at (425) 883-7990.

Amended and Re-Adopted February, 2016