



## PRIVACY POLICY

Protecting the privacy and confidentiality of every client's personal information is important to us. We value your business and seek to never violate your trust. We collect non-public information about each client that we maintain and use on a routine basis. This Policy describes our practices to help protect each current or former client's privacy.

### Information We Collect

CrestPoint Capital Management, LLC ("CPCM") collects personal, non-public information about each client to evaluate investment needs, manage portfolios, and provide individualized investment advice.

Such information can include name, contact information, tax ID number, assets, income and any other information regarding individual financial circumstances that comes from the client directly or his representative (accountant, lawyer, etc.). In addition, CPCM collects information from custodial statements and trade confirmations.

### How We Protect Your Personal Information

Access to non-public personal information is limited to those individuals who need to know that information to service client accounts. Non-public information may be shared with third party financial service providers, such as banks and brokers that supply custodian services and trade execution services, data service providers, and professionals or representatives that have a need to know and have been authorized to receive such information. Service providers are required to safeguard your information and use it only for authorized purposes. Access to non-public information may also be granted if required by law.

Physical information (client files, correspondence, etc.) is maintained with restricted access and discarded documents are shredded. Electronic information is password protected.

We are committed to protecting the privacy of each client from unauthorized access. Should you have any questions about our Privacy Policy or our procedures to protect your privacy, please don't hesitate to contact William Uhlemeyer.