HAMMOND ILES
WEALTH ADVISORS
Planning for life & legacy

WWW.HAMMONDILES.COM

Re: Our Financial Privacy Statement

Dear Valued Client,

Hammond Iles Wealth Advisors (hereinafter referred to as the "Advisor") provides a variety of investment advisory and financial planning services to clients who have contracted for these services. As a result, the Advisor is required to communicate its policies related to the privacy of customer information. We are proud of our privacy protection practices and procedures and want you to know how we protect your information and use it to service your account.

Please take a moment to review our privacy policy as described below:

In order to facilitate the servicing of your account(s), the Advisor may receive nonpublic personal information about you from the following sources:

- Information we receive from you on questionnaires, applications, account opening documents or other forms;
- Information about your transactions with us or others;
- Information we receive from a consumer reporting agency; and
- Information we received from other sources with your consent.

We **never** disclose any nonpublic or public personal information about you to anyone, except as permitted by law. Such disclosure may include the following:

- Disclosures to affiliates, including affiliated service providers (for example, insurance agencies for processing of variable insurance applications on your behalf);
- Disclosures to your chosen broker-dealer firm (for example, to establish a brokerage account on your behalf);
- Disclosures to government agencies, securities regulators and law enforcement officials (for example, for tax reporting, under a court order or to protect our legal rights);
- Disclosures to other organizations, with your consent (for example, other investment advisor firms in order to open a managed account with their firm or the brokerage firm they utilize); and
- Disclosures to other persons you authorize to obtain such information (for example, a CPA who will be preparing your tax return).

The Advisor restricts access to your personal and account information to those of its employees who need to know the information to provide products or services to you. The Advisor maintains physical, electronic, and procedural safeguards to guard your nonpublic personal information.

We will continue to adhere to the privacy policies and practices as described in this notice if you decide to close your account(s) or become an inactive customer.

If you have any questions concerning the Advisor's privacy policies and procedures, please feel free to contact us.

Thank you.

Hammond Iles Wealth Advisors

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