

Privacy Statement

Van Hubly Investments LLC is committed to safeguarding the confidential information you have entrusted us with. We collect nonpublic personal information in order to open and administer your accounts with us, and provide you with pertinent services and advice. We hold all nonpublic personal information you provide to us in the strictest confidence.

We collect personal information about you when you commence doing business with us, and when we open an account at a custodial firm for you. We may also gather information about your other financial accounts, tax returns, insurance policies, estate documents, etc. We maintain this information in our computer databases, and in our files when required. We maintain strict physical, electronic and procedural safeguards to protect your personal information.

We share your personal information only in the following circumstances:

- We do not ever sell or provide your personally identifiable information to mailing list vendors or solicitors for any purpose.
- We must provide custodial companies with information about you when we establish an account for you, but they are not allowed to use your personal information for their own purposes, and are obligated to maintain the strict confidentiality of your information. Their use of your information is limited to the specific service or account we have requested and the regulatory obligations of the companies we utilize.
- State regulators may also review firm records as permitted by law.
- With your express permission, we may share your information with other professionals you do business with, such as your accountant or estate planner, to help you accomplish your financial goals.

We agree to notify you in writing if there are any changes to our information sharing practices so you may have an opportunity to opt out of any disclosure suggested by such changes.

If your personal information, financial situation, goals or risk tolerance has changed, please contact us.