

SALEM PARTNERS WEALTH MANAGEMENT

PRIVACY POLICY

We greatly appreciate the trust that you and many other Salem Partners Wealth Management clients have placed in us. Salem Partners Wealth Management is committed to preserving that trust by respecting the privacy of all our clients to the best of our ability. We will not disclose your nonpublic personal information to anyone unless it is required by law, at your direction or consent, or is necessary to provide you with our services. We have not and will not sell your nonpublic personal information to anyone, even if our formal relationship ends.

THE INFORMATION WE COLLECT AND MAINTAIN:

The types of information we collect and maintain about you so that we can provide investment management services to you include:

- Information we receive from you to open an account or provide investment advice to you (such as your home address, telephone number and financial information)
- Information that we generate to service your account (such as trade tickets and account statements)
- Information that we may receive from third parties with respect to your account (such as trade confirmations from brokerage firms)

THE DISCLOSURE OF INFORMATION:

We will not disclose any nonpublic personal information about you or your account(s) to anyone unless one of the following conditions is met:

- Salem Partners Wealth Management receives your prior written consent
- Salem Partners Wealth Management believes the recipient is your authorized representative
- Salem Partners Wealth Management discloses your nonpublic personal information as necessary to effect or process a transaction in your account, or to maintain or service your account(s)
- Salem Partners Wealth Management is required by law to disclose information to the recipient

THE PROTECTION OF INFORMATION:

We have instituted firm-wide policies and procedures to protect your nonpublic personal information which include:

- Restricting access to your nonpublic personal information to those employees who need to know that information to provide products or services to you
- Maintaining physical, electronic and procedural safeguards to keep your nonpublic personal information safe