



## **PRIVACY POLICY**

The following information is provided, as required by law, to help you understand our privacy policy and how we will handle and maintain confidential personal information as we fulfill our obligations to protect your privacy. “Personal information” refers to the nonpublic financial information obtained by Squire Investment Management Company, LLC (SimCo) in connection with providing investment advisory or other services.

### **Information We Collect**

SimCo collects personal information as part of our relationship to you as an investment advisor, to provide client services and fulfill legal and regulatory requirements. The type of information SimCo collects may include:

- Information received from you on forms (such as name, address, Social Security number, assets and income).
- Information you provide SimCo directly about your personal finances or personal circumstances or which SimCo may receive from brokerage statements or other information you authorize SimCo to receive.

### **Information Disclosed In Administering Products and Services**

SimCo will not disclose personal information about current or former clients to non-affiliated third parties except as permitted or required by law. SimCo does not sell any personal information about you to any third party. SimCo will not disclose personal information without your authorization, except as required or permitted by law.

### **Procedures to Protect Confidentiality and Security of Your Personal Information**

SimCo has procedures in place that limit access to personal information to those employees who need to know such information in order to perform business services. SimCo educates our employees on the importance of protecting the privacy and security of confidential personal information.

SimCo will update our policy and procedures where necessary to ensure that your privacy is maintained and that SimCo conducts our business in a way that fulfills our commitment to you. If SimCo makes any material changes in our privacy policy, we will make that information available to clients through written communications.

Additionally, an updated Form ADV is available in our office. Please contact us if you would like a copy. If you have any questions about our Privacy Policy or ADV, please call Tim Christensen at 801.225.6900.