

# CPC Advisors, LLC

## PRIVACY NOTICE TO OUR CLIENTS

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At CPC Advisors, protecting your privacy is very important to us. As a financial services firm, we collect and use nonpublic personal information (NPI) in order to provide our clients (prospective, current, or former) with a broad range of financial services as effectively and conveniently as possible. We are providing you with this information as required by Regulation SP adopted by the Securities and Exchange Commission. We collect, handle, safeguard, and share all NPI in accordance with this policy.

### **WHAT IS NPI? WHAT TYPES OF NPI DOES CPC ADVISORS COLLECT AND FROM WHOM DO WE COLLECT IT?**

Nonpublic personal information (NPI) is confidential personal information about you that we obtain in connection with providing financial services or products to you. We generally collect NPI about you from the following sources:

- Information we receive from you on applications or other forms (e.g., names, address, income, etc.);
- Information about your transactions with us, our affiliates, our services providers, or other parties to transactions; and
- Information we may receive about you from unaffiliated financial service providers (e.g., custodians, insurance agents, attorneys, and consumer reporting agencies).

### **HOW IS YOUR NPI UTILIZED?**

We do not disclose any NPI about you without your express consent, except as described in this notice. We only share your NPI with (1) employees of our firm, (2) affiliates of our firm, (3) unaffiliated service providers (i.e., broker-dealers, banks, subadvisors, co-advisors, third-party managers, platform providers, account aggregation services and mutual fund companies) as necessary to effect, administer, or enforce transactions that the client has requested or authorized, or in connection with processing or servicing our services to you; (4) others who need to know such information in order to provide products or services to you, and (5) any other person or entity with whom we are permitted or required by law to share it. We will also receive NPI from some or all of the entities listed above. Disclosure of NPI to such parties is unrestricted and facilitated by your agreement and consent.

### **HOW WE PROTECT YOUR CONFIDENTIAL INFORMATION**

We restrict access to nonpublic personal information about you to those employees who have need for that information to provide investment services to you, or to employees who assist those who provide those services to you. We maintain physical, electronic and procedural safeguards to protect your nonpublic personal information.

### **DISCLOSING PERSONAL INFORMATION TO NON-AFFILIATED THIRD PARTIES**

We do not sell, share, or disclose your personal information to persons or entities other than as described above. We will not share or disclose such information to non-affiliated third-party marketing companies.

### **FUTURE POLICY REVISIONS**

This policy may change to reflect updates in our practices, procedures, or regulatory requirements concerning the collection and use of NPI. As our client, you will receive notifications at least annually and our revisions or changes to this policy will be highlighted in our annual notifications. If you have any questions regarding our privacy policy, please do not hesitate to contact your investment advisor representative using the contact information below.