



PRIVACY POLICY

Iambic Financial L.L.C. (“Iambic”) is committed to safeguarding and maintaining the confidentiality, integrity and security of the personal information that is entrusted to us. We do collect nonpublic personal information to provide you with accurate and pertinent financial and tax advice. We hold all nonpublic personal information you provide to us in the strictest confidence and do not sell your information to anyone.

The categories of nonpublic information that we collect from you may include information about your personal finances, information about your health to the extent that it is needed for the financial planning process, information about transactions between you and third parties, and information from consumer reporting agencies, e.g., credit reports. We use this information to help you meet your personal financial goals. Types of PII we collect include, but are not limited to: Name, Address, Phone Number, Email Address, Social Security Number, Assets & Liabilities, and Income & Expenses. Iambic may collect non-public information about you from the following sources: Account Statements, Risk Profiles, Tax Returns, Insurance Policies, Estate Planning Documents, and other documents related to your financial and/or planning situations.

With your permission and when appropriate in connection to the management of your wealth and financial plans, we disclose limited information to attorneys, accountants, and mortgage lenders with whom you have established a relationship, including sharing a limited amount of information about you with your custodian in order to execute securities transactions on your behalf. You may opt out from Iambic’s sharing financial information with the non-affiliated third parties by notifying us at any time by telephone, mail, email, or in person.

We maintain a secure office to ensure that your information is not placed at unreasonable risk. We employ a firewall barrier, secure data encryption techniques and authentication procedures in our computer environment. We do not provide your personal information to mailing list vendors or solicitors.

We require strict confidentiality in our agreements with unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors. Federal and state securities regulators may review our company records and your personal records as permitted by law. Personally identifiable information about you will be maintained while you are a client and for the required period thereafter that records are required to be maintained by federal and state securities laws. After that time, information may be destroyed.

We will notify you in advance if our privacy policy is expected to change. We are required by law to deliver this Privacy Notice to you prior to or at the time of engagement and annually, in writing.