

Investor Resources, Inc ***Privacy Policy***

Protecting your privacy is important to us. We want our clients to understand what information we collect and how we use it. We consider your data to be private and confidential, and we will hold ourselves to the highest standard of trust and fiduciary duty in their safekeeping.

We collect information about you from disclosures made to us orally or in writing during our face-to-face or teleconference meetings with you and through documents you may provide to us directly or through a non-affiliated advisor our firm works with on your behalf in our role of financial advisor, sub-advisor, or portfolio manager. In some cases, a formal questionnaire or written notes based on your responses to our inquiries designed to enable us understand your financial situation, your viewpoint on investment risk and your personal life objectives are compiled and retained in our files. We may collect nonpublic personal information such as your name, address, and social security number. We may need to use this information to process your requests, establish accounts and enter transactions for you in conjunction with the performance of our contractual obligations to you.

As a result, we do disclose your personal information from time to time to companies that are involved with servicing your account such as custodians and brokers. We may also disclose information to third-party companies and employees providing services to our firm. Such service providers and employees must agree to binding, strict confidentiality agreement provisions, or otherwise be themselves governed by federal and other statutes that require protection of your privacy.

Otherwise, we do not disclose any nonpublic personal information about you to anyone, except as permitted by law or by exception to our general policy based on your expressed documented consent such as with your CPA or tax or legal advisor.

We designed and adopted internal policies and procedures to safeguard your personal information. The procedures include physical, electronic and other safeguards to keep data secure. We will continue to adhere to the privacy policies and practices described in this notice for all former clients, whose records are maintained for a prudent time period as former clients for their reference or retrieval benefit, and to have available for any internal, external or regulatory authority audit or other examination requirement.