

Privacy Policy

Notice of Connective Portfolio Management, LLC Client Privacy Policy

Our Commitment to Your Privacy: Connective Portfolio Management, LLC (“Connective”) has a policy of protecting the confidentiality and security of information we collect about our clients. We do not share non-public information about you outside of Connective, without your consent, except for the specific purposes described below, in accordance with all applicable laws. This Notice describes the information we may gather and the circumstances under which we may share it.

Why We Collect and How We Use Information: We limit the collection and use of information to the minimum that we require to deliver exceptional service to you. This includes maintaining your Connective accounts, processing transactions requested by you or other persons authorized by you, and all other activities related to us conducting business and providing service.

How We Gather Information: We collect and maintain nonpublic, personal information we receive from you directly, on applications, other forms and from your transactions with unaffiliated parties and us. This information includes, for example, your name, address, Social Security number, assets, income, financial needs and goals, account balances and transactions, including those with unaffiliated third parties. We use this information only to process your requests and transactions and to provide you with financial advice.

How We Protect Information: We restrict access to nonpublic personal information about you to those Connective employees who need to know that information to provide services to you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

Disclosure of Information: We will not disclose any nonpublic personal information about you to any third party, except as may be required by law, regulatory or accounting procedures, or upon your written request. We may disclose this information to third parties as permitted by law, including the outside broker-dealers, custodians, accountants or attorneys that we need to use to provide our services to you. From time to time, we must give information about our business to regulatory authorities. This may include personal information about you. We will not make any disclosures of information to other companies who may want to sell their products or services to you directly. For example, we do not sell customer lists, nor do we sell client names to catalog companies or telemarketers.

Our Former Clients: Our Privacy Policy actively covers and protects former clients as well as current clients of Connective.

Further Information: We reserve the right to change this Privacy Policy at any time. The examples contained in this Privacy Policy are not intended to be exclusive. This notice complies with a U.S. Federal law and regulations regarding privacy. Additional rights under other foreign or domestic laws may apply to you.