



# PRIVACY NOTICE

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## YOUR PRIVACY IS IMPORTANT TO US

You provide important information about yourself to a variety of businesses and organizations. The same is true when you do business with IRA Financial Trust Company. You are asked to provide us with certain personal information that helps us give you better service and complete your transactions more effectively.

We work diligently to safeguard the information you give to us. In fact, we have developed the following policies to ensure your confidentiality and to maintain your confidence in our institution. These policies detail the strict standards we have in place. For this reason, we ask you to please read the following information carefully. In it, we will tell you the sources for nonpublic personal information we collect on our customers, and what measures we take to secure that information.

## DEFINITIONS

We, our, and us, when used in this notice, mean IRA Financial Trust Company. The words you and your mean account customers who have continuing relationships with us in self-directed IRA accounts where we act as custodian or trustee.

Nonpublic personal information means information about you that we collect in connection with providing a financial product or service to you. Nonpublic personal information does not include information that is available from public sources, such as telephone directories or government records.

An affiliate is a company we own or control, a company that owns or controls us, or a company that is owned or controlled by the same company that owns or controls us. Ownership does not mean complete ownership, but means owning enough to have control.

A nonaffiliated third party is a company that is not an affiliate of ours.

## INFORMATION THAT WE COLLECT ABOUT YOU

We collect nonpublic personal information about you from the following sources:

- Information we receive directly from you on applications and other forms
- Information about your transactions with us
- Information about your transactions with non-affiliated third parties
- Information from consumer reporting agencies

## INFORMATION WE DISCLOSE ABOUT YOU

It is our policy not to disclose any nonpublic personal information about customers to anyone, except as required by law. Naturally, in the course of providing you with products or services that you have requested or already have with us, when necessary we disclose customer information required by companies who work for us, such as check printing or data processing companies.

## THE CONFIDENTIALITY, SECURITY AND INTEGRITY OF YOUR NONPUBLIC PERSONAL INFORMATION

We limit access to nonpublic personal information to those employees who need to know that information to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with Federal standards to guard your nonpublic personal information.

## NON-PUBLIC PERSONAL INFORMATION AND FORMER CUSTOMERS

It is our policy not to disclose any non-public personal information about former customers to anyone, except as permitted by law.