

## **PRIVACY POLICY OF INVESTMENT PARTNERS LTD**

### *How and Why We Obtain Information*

Investment Partners LTD collects information about you to help us serve your financial needs, provide customer service, offer new products or services, and fulfill legal and regulatory requirements. Any collection of personal information is to support our normal business operations and service your account.

Some of the nonpublic personal, financial, and health information Investment Partners LTD collects comes from you. The source and the information collected may include:

- ◆ Information on applications and related forms, such as name, address, Social Security number, assets and income, and medical information if applying for insurance;
- ◆ Information regarding your transactions with us, such as services purchased, account balances, and payment history;
- ◆ Information from consumer reporting agencies, such as credit relationships;
- ◆ Information from your employer, association, or benefit plan sponsor, such as name address, Social Security number, assets, and income.

### *Sharing Information*

Investment Partners LTD does not disclose nonpublic personal information about you to anyone. However, in the course of servicing your account, we may share information collected about our customers, as previously described above, with other unaffiliated service providers such as insurance companies, mutual fund companies, broker/dealers or investment firms to provide account maintenance or customer service to your account. We may also disclose your information to other organizations as permitted by law such as government agencies and law enforcement officials (for example, for tax reporting or under court order), or to other organizations and individuals with your consent (for example, to an attorney or tax professional).

### *Protecting your Information*

Investment Partners LTD maintains physical, electronic, and procedural safeguards to guard your nonpublic personal information to ensure that we are complying with our own policy, industry practices, and federal or state regulations. If you decide to close your account(s) or become an inactive customer, we will adhere to the privacy policies and practices as described in this notice.

Investment Partners LTD reserves the right to change this Privacy Policy at any time, without notice, and will notify customers of any modifications on an annual basis.