



## **Privacy Policy of Strategy Asset Managers, LLC**

Federal law requires financial institutions to inform clients of their policies relating to the protection of personal financial information. The following statement describes how Strategy Asset Managers, LLC protects your private and confidential 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.

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 request.

We restrict access to nonpublic personal information about you to those Strategy Asset Manager employees or designated affiliated parties that are subscribers to our Privacy Policy 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.

December 2011