



**SOLARI  
INVESTMENT  
ADVISORY  
SERVICES, LLC**

Post Office Box 136  
Hickory Valley  
TN 38042, USA  
Tel: 731.764.5168  
Fax: 731.764.2232

# *Solari Advisors Privacy Policy Statement*

*Dated June 19, 2018*

This Privacy Policy Statement discloses the privacy practices for Solari Investment Advisory Services, LLC ("Solari Advisors") and our website; <http://www.solariadvisors.com>.

This Privacy also covers information collected from investment advisors and other companies to which we provide products and services. It will notify you of the following:

What information we collect; With whom it is shared; How it can be corrected; How it is secured; How policy changes will be communicated; and How to address concerns over misuse of personal data.

We understand and respect the privacy of non-public personal information we receive at Solari Advisors, including from this website.

This Privacy Policy Statement applies to our relationship with you if you are an investment advisor or financial institution that obtains investment screens or research services from Solari Advisor for use in your advisory business.

## **RECOGNITION OF EXPECTATION OF PRIVACY**

You regard your business information as private, and so does Solari Advisors. Because we do not sell or share your information with third parties not associated with services we conduct for you or on your behalf (except as required by law), it is not necessary that you to tell us not to share your private information.

## **INFORMATION WE COLLECT**

We are the sole owners of the information collected on this site. We do not collect information on our website other than default log information in our web server software (e.g. IP address, time of access and where the visitor went on the site as well as type of browser and computer platform.)

We have access to/collect information that you voluntarily give us via email, mail or other direct contact from you.

If we provide you with products and services, in the course of doing business with you, Solari Advisors may collect non-public information about you from a variety of sources:

- Contact information for your company and employees;
- Information about your business and investment operations;
- Suggestions, questions and input you may have provided us by email.

We prefer that any private digital information you send to us be password protected. We welcome the use of your secure digital system if available for communication. We believe that digital systems are inherently insecure and may be unstable. We therefore prefer your provide confidential information by phone or by US mail or courier.

We request that you not share confidential data about your individual clients with us. In the event that you must do so, we request that you send us this data in hard copy by US mail or courier.

## **MAINTENANCE OF INFORMATION**

Solari has internal procedures designed to maintain accurate records concerning your information. Should you ever believe that our records contain inaccurate, incomplete or non-current information about you, please notify us. We will respond to requests to correct the information in a timely manner.

## **INFORMATION WE SHARE**

We will not sell or rent information collected on this website to anyone. We may use your informa-



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tion (e.g., your email address) to respond to you regarding the reason you contacted us. We will not share this information with any third party outside of our organization, other than as necessary to fulfill your request or with IT contractors, advisors, lawyers, etc. on a “need to know” basis. Unless you ask us not to, we may contact you via email in the future to tell you about products or services, or changes to this privacy policy.

You may opt out of any future contacts from us at any time. You can do the following at any time by contacting us via the email address or the phone number provided on our website:

- See what data we have about you, if any.
- Change/correct any data we have about you.
- Have us delete any data we have about you.
- Express any concern you have about our use of your data

If you transact business with us, we are permitted by law to share information about our transactions or experiences with you or regarding our relationship.

We may disclose information to nonaffiliated third parties as mandated by law. For example, this may include a lawful order or requirement of a court or governmental authority having competent jurisdiction, including subpoena, court order, and presentation of a warrant or other legal process. Unless prevented from doing so by law or other official action or requirement, we will inform you before providing any information about you under these circumstances.

Except as expressly agreed in advance by you, we do not share with third parties (other than contractors and legal counsel and other advisors who are bound by our policy of confidentiality and non-disclosure as if they were direct employees) other information you have given us in connection with a business relationship and transactions.

### **INFORMATION SECURITY**

We restrict access to non-public personal information to those employees, contractors, advisors (such as the legal and accounting advisors whose names you have given us in connection with products or services rendered by Solari Advisors) who need to know that information in order to provide our products and services to you,

We maintain physical, electronic and procedural safeguards to prevent disclosure of your non-public information. However, we believe that digital systems are insecure no matter what safeguards we take.

If your relationship with us ends, we will continue to adhere to the policies and practices described in this policy statement.

### **LINKS**

Our web site contains links to other sites. Please be aware that we are not responsible for the content or privacy practices of such other sites. We encourage our users to be aware when they leave our site and to read the privacy statements of any other site that collects personally identifiable information.

### **COOKIES**

A “cookie” is a piece of data stored on a site visitor’s hard drive to help the website owner improve the visitor’s access to the site and identify repeat visitors to the site. We do not use cookies on our site.

### **NOTIFICATION OF CHANGES**

We reserve the right to amend this Privacy Policy Statement from time to time. If you transact business with us, in the event we make material amendments to this Policy, you will be notified by email at your email address according to our records.

We welcome your comments and suggestions on our Privacy Policy.