

Our Privacy Promise

We do not sell information about you.

We do not share your information with anyone else for marketing purposes.

We use your personal information only to help transact the business you have with us.

Privacy Notice to Our Advisory Clients

As our client, you trust us to help you achieve financial success and security. We provide this notice because you have a right to know how we protect the privacy of the personal information you share with us. Your knowledge of our privacy principles and practices will confirm the trust you have placed in us.

What Personal Information Do We Collect?

The type of information that we collect depends on the type of advisory service we provide. This includes:

Information you provide on a questionnaire or other form (for example, name, address, social security number, or income).

Information about your business and history with us.

Most of the personal information we collect is obtained from you. We collect personal information needed only to service and administer your business with us.

How Do We Use and Disclose Your Information?

The main use of your information is to confirm your identity in the course of business that we perform at your request.

We also use your information to service your accounts with us. Information may be disclosed to other entities that provide business services to us related to our transactions with you. This may include administrative or audit services. Examples are your producer/registered representative or broker. Before we disclose your information, these entities must agree to keep it private.

We may also share information within our corporate family to service your business. For example, our business units provide administrative services. If necessary, we disclose information when it is required by law. We may also disclose certain information to other entities to help us report or prevent fraud. Examples are reports to a regulatory or law enforcement agency.]

How Do We Protect the Security of Your Information?

We have policies to maintain physical, electronic, and procedural safeguards to protect the confidentiality of your personal information. Access to personal information is available only to those people who need to know it in order to service your business.

Should your relationship with us end, we will continue to follow the privacy policies described in this notice to the extent that we retain information about you. If we no longer need to retain that information, we will dispose of it in a secure manner.

Do You Need to Do Anything?

It is not necessary for you to take any action. This is because we do not share your information except to service the business you have requested from us. You do not need to “opt-out” or “opt-in” as you may have done with other financial companies.

How Can You See And Correct Your Information?

Generally, you have the right to review the personal information we have about you. You must request this in writing. We are not required to provide you with information we have collected in connection with a claim or lawsuit. If you believe that any of the information we have is in error, you may write us and request a correction. Where justified, corrections will be made.

Please direct inquiries about accessing or correcting your information to the address below:

Cube Residential

PO Box 2398

Capistrano Beach Ca 92624

If you have questions regarding this Privacy Promise, please call 949-579-2529

Please have a copy of all your financial records available, when you call so we may provide you with the best service.

We will send you a copy of our privacy notice annually.