

# Portfolio Management, LLC

*Building Wealth Wisely*

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## Privacy Policy

As required by the Securities and Exchange Commission and the Federal Trade Commission, this memo explains how Portfolio Management, LLC (the Advisor) handles the personal and private information of its clients. The Advisor is committed to maintaining the personal information of clients in the strictest confidence and to keeping this information private at all times.

It is the strong belief of the Advisor that client relationships are the most important asset to the business. To maintain trust with clients, the Advisor does not disclose any confidential personal information about clients to anyone, except as required by law or as specified by a client - such as providing financial information to an accountant, attorney, or family member specifically designated by the client.

Examples of when personal information might be shared as required by law include mandatory cooperation with law enforcement authorities in a bona fide investigative matter or with securities regulators, such as the Securities and Exchange Commission, in a legitimate regulatory inquiry.

In the ongoing practice of managing a client's monies, no additional personal information is shared with account custodians, such as Schwab, that the client has not already agreed to provide to the custodian for the purposes of opening and maintaining an account.

Other than the above exceptions, at no time does the Advisor share the personal information of any client with anyone, for any reason, without the permission of the client. Any doubts about the confidentiality of client information will be resolved in favor of confidentiality.