



PRIVACY POLICY

PROTECTING YOUR INFORMATION IS IMPORTANT TO US

We believe that the responsible use of personal information collected from you is critical to our business objectives and reputation. As part of our commitment to privacy, we have adopted this Privacy Statement. For prospective, current, and former clients, we do not disclose any nonpublic personal information with any affiliated or non-affiliated parties except as required by law, as authorized by you, or as may be required to carry out the services for which you have contracted with us. Your information is only shared with our employees who need access to perform such services for you.

We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization. We may obtain additional information from brokerage statements, applications and forms, our website, or other information you authorize us to receive.

Any employee of Allied Portfolio Management, Inc. is prohibited from disclosing to persons outside the firm any material nonpublic information about any client, the securities investments made by the firm on behalf of a client, information regarding the firm's trading strategies, except as required to effectuate securities transactions on behalf of a client or for other legitimate business purposes.

We retain records relating to professional services that we provide so that we are better able to assist you with your investment needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards and as required by law.

YOU ARE SAFEGUARDED

Information concerning the identity of security holdings and financial circumstances of clients is confidential. All information about clients must be kept in strict confidence, including the client's identity (unless the client consents), the client's financial circumstances, the client's security holdings, and advice furnished to the client by the firm.

CONTACT US

For further information about our Privacy Policy, Code of Ethics, or Company Brochure (ADV Part 2) please contact our Operations Department at 520-296-1035.