

## Privacy Policy

During the course of our relationship, Portfolio Design Advisors and Select One, (hereafter “We”) collect and retain non-public information (“NPI”) about you (e.g. name, address, Social Security number, birth date, assets and income) from the following sources:

- Investment Management Agreements, new account forms and other forms and agreements
- Transactions with us, our clearing firm, or other chosen investment sponsors
- Other various materials utilized by your representative in order to put forth an appropriate recommendation or to fill a service request

We may use this information in order to develop, offer, and deliver products and services; process transactions in your account; respond to inquiries from you or your representative; or to fulfill legal and regulatory requirements.

We do not disclose/share any NPI of our customers or former customers to any unaffiliated third party unless:

1. It is necessary to fulfill a transaction or service request related to your account(s)
2. We are required to do so by a regulator, a court of competent jurisdiction or applicable law
3. It is by customer request

As this is our practice, we are not required to have “Opt-out” provisions or methods per the exemptive relief provided under section 248.13 of the Gramm-Leach-Bliley Act.

We restrict access of NPI to required personnel in the provision of requested services and maintain physical, procedural and electronic safeguards that comply with federal standards.