



Financial Advisory Services, LLC

PROVEN RESULTS

To Our Customers:

Innovation Partners, LLC (“IP”) values you as a customer and respects your right to privacy. We recognize that you have placed your trust in us, and we take the responsibility to preserve that trust. One way we endeavor to keep your trust is to properly handle that personal information.

We pledge to you that:

- Protection of your privacy is a top priority;
- Your account information and all documents you provide to us are protected in a secure environment;
- We only collect personal information in order to accomplish our customer commitments to you;
- Information about you is only used and shared in limited and controlled ways; and,
- In the event that we wish to share information about you with non-affiliated third parties, you will be given options concerning what information may be shared, and your privacy wishes will be respected. You may also choose to opt out of any information sharing.

IP maintains physical, electronic and procedural safeguards to ensure that personal information we have about you is treated responsibly, and in accordance with our IP Financial Advisory Services LLC. We restrict access to information about you only to those representatives and employees who need to know that information in order to provide products and services to you or to conduct IP’s business. Representatives or employees who have access to the information may only use it for legitimate business purposes. In addition, we take steps to safeguard information about you in accordance with applicable data security regulations.

We may collect personal information about you from these sources:

- Product vendors, as a result of your transactions with them; and/or,
 - We may disclose the following categories of information to entities that perform administrative services on our behalf or as required or permitted by law for legal, regulatory, or other purposes:
 - Information you provide directly to us applications or other forms;
 - Information we receive about your transactions with us or with our product providers; and/or,

IPFAS pledges to work to protect the security of your confidential information. Please refer all complaints to:

IP Financial Advisory Services LLC

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Email: management@ipfinancialservicesllc.com