

Privacy Policy

November 1, 2010

Protecting your privacy is a core value of our business.

You trust us with your financial and other personal information and we are committed to respecting your privacy and safeguarding that information, as described below. We are sending you this document as required by Federal law.

Collection and use of client information.

We collect only relevant information about you and our other clients that the law allows or requires us to have in order to conduct our business and properly service your accounts. We collect financial and other personal information about you from the following sources:

- Information you provide on applications or other forms or oral, written or electronic communications with us;
- Information derived from your transactions with us, our affiliates or others;
- Information we receive from non-affiliates, such as your bank or broker.

Keeping information secure.

We maintain physical, electronic and procedural safeguards to protect your financial and other non-public personal information, and we regularly assess new technology with the aim of adding additional safeguards to those we have in place, or upgrading existing safeguards and procedures, as appropriate.

Limiting employee access to information.

We limit access to non-public personal information about you to those employees with a business reason to know that information. We train our employees to respect client privacy and to recognize the importance of confidentiality. Those who violate our privacy policy are subject to disciplinary action.

Accuracy of information.

We strive to keep our records of your information accurate, and we take prompt steps to correct errors that are brought to our attention. If there are any inaccuracies in your statement, or in any other communication from us, please contact us.

Use of personal and financial information by us and third parties.

We do not disclose any non-public personal information about our clients or former clients to anyone, except as permitted by law. As permitted by law, we may share non-public personal information about you with other third parties who provide services for your account. The information we share may include:

- Information you provide on applications or other forms or through oral, written or electronic communications (for example, your name, address, social security number and birth date);

- Information derived from your transactions with us, our affiliates or others (for example, transaction amounts, account balances and account numbers);
- Information we receive from non-affiliates (such as your bank account or brokerage account number or account balances).

The types of third parties to whom we may disclose non-public personal information about you include:

- Financial service providers who need such information to service your accounts, such as transfer agents and brokers;
- Non-financial companies such as the companies that provide us with technological and administrative support.

Protecting information online.

If you contact us via e-mail, we preserve the content of your e-mail, including your e-mail address, and our response so that we can more efficiently handle any follow-up questions you may have and to meet legal and regulatory requirements. It is important for you to understand that regular, non-encrypted, internet e-mail is not secure. We strongly urge you not to send confidential information, such as social security or account numbers, to us via a non-secure e-mail address.

This is our privacy policy as of the date first written above. This privacy policy applies to individuals, and we reserve the right to change any or all of the principles, along with related provisions, at any time.

Olson Tax Planning