



Privacy Policy

The safeguarding of your personal nonpublic information is extremely important to us. When you become a client of Imagine Math, sharing certain personal information is necessary in order to provide you with financial planning and investment advisory services. Imagine Math pledges to make every effort to maintain the confidentiality of this information and to share it only when necessary to serve you as a client and in accordance with the law.

Imagine Math maintains physical, electronic, and procedural safeguards that comply with federal standards to protect your nonpublic personal information. These policies and the underlying procedures are detailed in the Imagine Math *Compliance Manual*.

Nonpublic personal information we collect includes identifying information such as social security number and birthdate, records regarding personal background, Investment Policy Statements and their supporting documentation, tax records, investment holdings and statements, and any other information collected in order to offer you investment advisory services.

It is the policy of Imagine Math to restrict access to all current and former client information to those authorized employees or outside third parties (e.g. a custodian) who need to know the information in order to provide advisory services. Employees who access your information are required to know and to commit to abide by our policies and procedures for protecting your privacy.

Imagine Math will disclose non-public client information when required to do so by a judicial or regulatory process.

If you disclose information in a document for processing by Imagine Math to facilitate our business relationship via an outside third party (e.g., account opening forms for a custodian), completing the document implies you consent to sharing the information with the third party.

You may submit a written request to us to correct, amend or delete any nonpublic personal information in our possession. We anticipate responding to your request within 10 business days.

Our commitment to protecting your information has no expiration. Although our client relationship may end, the firm's privacy policy remains in effect and we will not share your information other than as described above.

Imagine Math may amend this privacy policy periodically. When changes are made, you will receive a letter of notice. In addition, you will receive a copy annually even if no amendments have been made.

Direct any questions about our *Privacy Policy* to Christine White at 303-523-0893 or christine@imaginemath.com.

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