



VISIONPOINTSM

Privacy Policy

Investment advisers are required by law to inform clients of policies regarding privacy of client information. We are bound by professional standards of confidentiality more stringent than those required by law. Federal law gives the customer the right to limit some but not all sharing of personal information. It also requires us to tell you how we collect, share, and protect your personal information. Questions regarding this policy can be directed to VisionPoint at 972-361-1001 or kbeaudoin@vpadvisor.com.

TYPES OF NONPUBLIC PERSONAL INFORMATION (NPI) WE COLLECT

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. This can include, but is not limited to, your Social Security Number, Date of Birth, Banking Information, Financial Account Numbers and/or Balances, Sources of Income, and Credit Card Numbers or Information. When you are no longer our customer, we may continue to share your information only as described in this notice.

PARTIES TO WHOM WE DISCLOSE INFORMATION

Investment Advisers may need to share personal information to run their everyday business. The following are reasons that we may share your personal information:

1. For everyday business purposes – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus;
2. For our marketing – to offer our products and services to you;
3. For joint marketing with other financial companies;
4. For our affiliates' everyday business purposes – information about your transactions and experiences; or
5. For affiliates and non-affiliates to market to you.

(Affiliates – companies related by common ownership or control. They can be financial and non-financial companies; Non-affiliates – companies not related by common ownership or control. They can be financial and non-financial companies; Joint marketing – a formal agreement between non-affiliated financial companies that together market financial products or services to you.)

Disclosure of information may begin on the date you sign our Investment Advisory Contract. When you are no longer our customer, we may continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.

PROTECTING THE CONFIDENTIALITY OF CURRENT AND FORMER CLIENT'S INFORMATION

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards and secured files and building.

FEDERAL LAW GIVES YOU THE RIGHT TO LIMIT SHARING – “OPTING OUT”

Federal law allows you to “opt-out” of sharing of the following: sharing for non-affiliates' everyday business purposes – information about your creditworthiness; or sharing with affiliates or non-affiliates who use your information to market to you. State laws and individual companies may give you additional rights to limit sharing. Please notify us immediately if you choose to opt out of these types of sharing.

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Contact your advisor if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services is our highest priority.

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