

PRIVACY NOTICE

The Martin Worley Group

Our Privacy Policy. In providing financial services and products to you, we collect certain nonpublic personal information about you. Our policy is to keep this information strictly safeguarded and confidential, and to use or disclose it only as necessary to provide our services or products to you, or as permitted by law. Our privacy policy applies equally to our former clients. Protecting your privacy is important to us.

Information We Collect. “Nonpublic personal information” is personally identifiable financial information about you as an individual or your family. The kinds of nonpublic personal information we collect includes the information you give us when you open an account with us or when we discuss your account with you, such as your name, address, telephone number, your employment, family, and personal financial situation and your investment objectives. We also have information about your investment account assets and transactions, including your holdings and transactions in fund shares, and the brokerage and custodial arrangements for your account.

Information We Disclose. We disclose nonpublic personal information about you only as permitted by law or authorized by you, to our affiliates or to third parties that we hire to help us provide our products and services to you.

How We Safeguard Your Information. We limit access to your nonpublic personal information to those persons who need to know it or who are permitted by law to receive it. We maintain physical electronic and procedural safeguards to protect the confidentiality of your information.

If you have any questions regarding our Privacy Policy, please contact us at 801-568-9788 or 1-800-565-9788.