



Stone Bridge Asset Management, LLC

Privacy Policy

Stone Bridge Asset Management, an independent registered investment advisor, regards privacy of client information to be essential. We hold all personal information provided to our firm in the strictest of confidence. The non-public personally identifiable information about current and prospective clients which Stone Bridge collects shall not be disclosed to any unauthorized individual or entity, except as permitted or required by law. This information includes information that Stone Bridge receives or develops about a client and includes (1) information provide by clients orally or in written or electronic form and (2) information developed in the course of providing services to clients, including but not limited to level of assets and transactional information.

Information Stone Bridge will Collect

Stone Bridge will collect only such information as is required to comply with applicable statutes. Stone Bridge may additionally collect controlled information that is jointly determined to be useful to meet the client's investment needs.

How Stone Bridge Protects Information

Stone Bridge considers all information obtained from the client to be controlled. We maintain physical, electronic and procedural safeguards to protect the client's private information.

Sharing of Information

Stone Bridge does not share clients' private information with any entity other than in the course of performing investment advisory services to its client. Stone Bridge relies on certain third parties for services that are necessary for operations. These may include but are not limited to Select Managers, attorneys, auditors, custodians and trustees, who in the ordinary course of business with Stone Bridge may require access to materials containing clients' nonpublic personal information. Additionally Stone Bridge may disclose client nonpublic personal information where required by law or judicial process, to others with client consent, or otherwise to the extent permitted under federal privacy laws.