



TIMONIER

Timonier Privacy Policy

At Timonier, we are committed to maintaining the confidentiality, integrity, and security of our clients' nonpublic personal information. This Privacy Policy outlines our practices regarding the collection, use, and protection of your information, in accordance with Regulation S-P and other applicable laws.

Regulation S-P Compliance

We comply with the requirements of Regulation S-P, which mandates that financial institutions provide notice of their privacy policies and practices to customers and safeguard nonpublic personal information.

Information We Collect

We collect information about you from the following sources:

- Information you provide on applications or other forms (e.g., name, address, Social Security number, income)
- Information about your transactions (e.g., account balances, trading activity)
- Information from third parties (e.g., custodians, brokers, or other service providers)

How We Use Your Information

We use your information to:

- Provide investment advisory services
- Maintain your accounts
- Communicate with you
- Comply with legal and regulatory requirements

Information We Share

We do not disclose information about our clients or former clients to anyone, except as permitted or required by law. This may include disclosures to:

- Service providers who assist in servicing your account
- Regulatory authorities
- Legal entities in response to subpoenas or court orders

Safeguarding Your Information

We maintain physical, electronic, and procedural safeguards to protect your information. These include:

- Secure data storage and transmission protocols including firewalls, encryption and antivirus software
- Updated passwords
- Access controls and authentication systems
- Employee training on data privacy and security

Changes to This Policy

We may update this Privacy Policy from time to time. When we do, we will notify you promptly as required by law and post the revised policy on our website.

Contact Us

If you have any questions about this Privacy Policy or how your information is handled, please contact us at:

Timonier Family Office
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