

Wolfers Asset Management LLC

FINANCIAL PLANNING AND INVESTMENT ADVISORY SERVICES

OUR PRIVACY POLICY

At Wolfers Asset Management LLC we recognize the importance of protecting your privacy. We have policies to insure the confidentiality and security of your personal information. The following gives our policy regarding what information we collect from you and how we use that information to serve your account.

We collect nonpublic personal information about you from the following sources: information we receive from you orally or on applications or other forms, information about your transactions with us or with others and information we receive from a consumer-reporting agency.

We do not disclose any nonpublic personal information about our customers or former customers to anyone, except as permitted by law, or at your request and only to whom you request.

We restrict access to nonpublic personal information about you to those persons who need to know that information to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic personal information. Records related to former clients are maintained for last least 6 years to comply with regulatory requirements. After the mandatory retention period has lapsed, client records will be disclosed of in a secure manner.