

## **The Anchor Companies Privacy Commitment** **Important Information – Please Read**

By definition the Anchor Companies' relationship with our clients rests on a foundation of trust. We take pride in our reputation for superior integrity, honesty and quality customer service. By definition, information, much of which is confidential, is a cornerstone of our ability to provide superior service to our clients.

Keeping client information secure and confidential, and using this information to fulfill our fiduciary obligation to our clients, is a top priority for all of us at The Anchor Companies. Out of that priority we have formulated our commitment to our individual customers:

- We will protect and safeguard any information our clients share with us.
- We will permit only authorized associates (employees) who have been trained in the importance of maintaining client confidential information to have access to that information. All associates will be thoroughly briefed on the Companies Privacy Policy, and will acknowledge this briefing in writing.
- We will not reveal client information to unaffiliated third parties except for custodians and brokers with whom we must interact to conduct business on our clients behalf, trusted advisors whom clients have approved for disclosure and legally empowered regulatory entities.
- We will never sell, offer nor give client information to unaffiliated third parties for purposes of compiling mailing lists, solicitation lists or any other type of marketing program.
- We will attempt to keep client files complete, up-to-date and accurate. We will strive to periodically update our files to reflect changing circumstances, and we will periodically remind our clients to notify us of any significant changes in their lives which might have significant bearing on their investment management program.