

LBMC Investment Advisors, LLC - Notice of Privacy and Security

LBMC Investment Advisors, LLC considers our relationship with clients to be extremely valuable. This notice describes our privacy policy and security procedures, which are designed to cover all personally identifiable information. As required by law, LBMC Investment Advisors will advise you of our privacy policy and security procedures at least once annually and at any time there is a material change.

Confidentiality and Security of Information

Confidentiality and privacy of personal information are obligations LBMC Investment Advisors and its affiliates (including Lattimore, Black, Morgan, and Cain, P.C.) take seriously. LBMC Investment Advisors maintains strict policies and procedures to protect the confidentiality of your information during all stages of our relationship. Only those individuals who need to do so as a part of their job responsibilities are authorized to have access to your information. Employees and associates of affiliated companies are required to treat all personal information as confidential. In addition, LBMC Investment Advisors maintains physical, electronic and procedural safeguards to protect your personal information from unauthorized access and anticipated threats and hazards.

LBMC Investment Advisors ensures that the privacy of your nonpublic personal information is maintained at all times, including during the disposal of information that LBMC Investment Advisors is no longer required to maintain. For example, whenever possible, LBMC Investment Advisors shreds paper documents and records prior to disposal, requires off-site storage vendors (if any) to shred documents maintained in such locations prior to disposal, and erases and/or obliterates any data contained on electronic media in such a manner that the information can no longer be read or reconstructed.

Information LBMC Investment Advisors may collect and use

In order to open accounts and service clients, LBMC Investment Advisors collects personal information about you from the following sources:

- Information received from you on applications and other forms, documents and responses to our inquiries.
- Information about your transactions with LBMC Investment Advisors, our affiliates, and/or others.
- Other information that may be provided to us as we facilitate transactions or provide services that you requested.

Information LBMC Investment Advisors may disclose

LBMC Investment Advisors does not disclose any nonpublic personal information about current or former clients to any unaffiliated third parties, without your consent except as permitted or required by law.

LBMC Investment Advisors may disclose or report personal information in limited circumstances where we believe in good faith that disclosure is required or permitted under law - for example, to cooperate with regulators or law enforcement authorities. We may also disclose or report personal information to affiliated parties when we believe in good faith that the disclosure is a reasonable request for information in light of the service provided by the affiliate to the client. For example, an affiliate in the course of preparing a tax return for a client of LBMC Investment Advisors may request information regarding transactions in a client's investment account for that taxable year. LBMC Investment Advisors may supply that information directly to the affiliate rather than requiring the client to specifically authorize us to provide the information.