

AKM Advisory, LLC

5200 Willson Rd., Suite 150, Edina, MN 55424

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PRIVACY POLICY

Investment advisers are required by law to inform their clients of their policies regarding privacy of client information. We are bound by professional standards of confidentiality that are even more stringent than those required by law. Federal law gives the customer the right to limit some but not all sharing of personal information. It also requires us to tell you how we collect, share, and protect your personal information.

TYPES OF NONPUBLIC PERSONAL INFORMATION (NPI) WE COLLECT

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. This can include but is not limited to your Social Security Number, Date of Birth, Banking Information, Financial Account Numbers and/or Balances, Sources of Income, and Credit Card Numbers or Information. When you are no longer our customer, we may continue to share your information only as described in this notice.

PARTIES TO WHOM WE DISCLOSE INFORMATION

We will not disclose your personal or financial information to anyone unless:

- Requested to do so by a client or authorized client representative;
- Required/permitted by law to meet regulatory requirements, audit requirements, and court orders; or
- Required to process transactions, and maintain and service your account(s). Where this is necessary, our contractual arrangements with third party service providers require them to treat your information as confidential.

PROTECTING THE CONFIDENTIALITY OF CURRENT AND FORMER CLIENT'S INFORMATION

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards and secured files and office space.

FEDERAL LAW GIVES YOU THE RIGHT TO LIMIT SHARING - OPTING OUT

Federal law allows you the right to limit the sharing of your NPI by opting out. If you do not wish to allow AKM Advisory to provide your name(s), address and other personal information to third parties that provide non-essential services to AKM Advisory, please contact us at adam@akmadvisory.com.

Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

Last revised 11/19/2019