



# Titanium Advisors, LLC

Financial Planning + Investment Management

## Privacy Policy

Titanium Advisors understands that you have entrusted our firm with your personal and financial information and it is our mission to maintain that trust. Our Privacy Policy applies to all current or former clients of our firm as well as prospective clients that provided any of their non-public personal information.

The firm collects non-public personal financial information about its clients from the following sources:

- Information clients provide to prepare their financial plan;
- Information clients provide in documents and questionnaires;
- Information clients provide orally; and
- Information received from third parties such as attorneys and accountants.

The firm does not disclose non-public personal information about clients to **anyone**, except in the following circumstances:

- When required to provide services clients have requested;
- When clients specifically authorize the firm to do so; or
- When required by applicable state or federal law or regulation.

To ensure security and confidentiality, the firm maintains physical, electronic, and procedural safeguards to protect the privacy of its clients.

Personally identifiable information about the client or prospective client will be maintained during the span of the engagement, and for the period thereafter as required by federal and state privacy laws. After that time, information may be destroyed.

The firm will notify clients in advance if its privacy policy is expected to change.

February 2017