

Privacy Policy

Stabile Investment Management, LLC takes great measure to protect and safeguard information we gather on our clients. Per SEC regulation we are required notify you of our privacy policy.

Types of Information Collected

We collect nonpublic personal information about you from the following sources:

- * Information we receive from you on applications or other forms, such as your name, address, phone number, Social Security Number, date of birth, account numbers, and
- * Information about your transactions with us or with your custodian(s), such as buys, sells, gains, losses, fees, and/or holdings. Such information may be obtained from paper statements or via electronic download directly from your custodian.

Use of Personal Information

We do not sell your personal information to anyone.

We do not disclose nonpublic personal information about you to third parties, unless one of the following limited exceptions applies or you have specifically asked us to do so:

- * We disclose personal information to companies that help us process or service your transactions or account (such as Schwab Institutional or your accountant).
- We may disclose or report personal information in limited circumstances where we believe in good faith that disclosure is required or permitted under law. An example of this would be to cooperate with regulators or law enforcement authorities.

Stabile restricts access to your personal and account information to those employees who need to know that information in order to provide services to you. We maintain physical, electronic, and procedural safeguards to guard your nonpublic personal information.

Changes to Privacy Policy

Stabile reserves the right to change its privacy policy at any time and will do so with prior notice. Any changes to the privacy policy will be mailed to you and posted on our website at www.stabileim.com under the Privacy section.

Phishing Scams

Stabile does not send emails to customers requesting customer information. If you receive an email purporting to be from Stabile that asks you to supply personal or account information, logins or passwords, do not provide any such information. Those emails would be fraudulent and may be used in connection with scams known as phishing. Stabile asks that you report any suspicious emails to Stabile.

Contact and Modifying Personal Information

Personally identifiable information about you will be maintained during the time you are a client, and for the required time thereafter that such records are required to be maintained by federal and state securities laws. After this required period of record retention, all such information will be destroyed. If you wish to have Stabile make changes or corrections to personal information in Stabile's possession, please contact us at 630-322-7900.