



## **Trinity Investment Advisors, LLC.**

### **Privacy Policy**

A recently enacted federal statute, known as the Gramm-Leach-Bliley Act requires us as a “financial institution” to take affirmative steps to explain to you what our specific policy is with regard to the usage of information about you which you may have provided to us or with regard to the other information that we may have collected about you.

#### **Categories of Information We Collect**

We at Trinity Investment Advisors, LLC. collect non-public personal information about you from the following sources:

- Information we receive for you on applications or other forms
- Information about your transactions with us, our affiliates, or others

#### **Categories of Information We Disclose**

We at Trinity Investment Advisors, LLC. may disclose the following kinds of nonpublic personal information about you:

- Information we received from you on applications and or other forms such as your name, your address, your social security number, your asset level, and/or your income letter.
- Information about your transactions with us, our affiliates, or others such as your account balances, your payment history, and/or parties to transactions

#### **Categories of Parties to Whom We Disclose**

We at Trinity Investment Advisors, LLC. may disclose non-public personal information about you to the following third parties:

- Financial services providers, such as other investment advisors, outside custodians, broker/dealers, life insurance agents, banks, etc.

## **Service Provider/Joint Marketing Arrangements**

We at Trinity Investment Advisors, LLC may disclose the following information to companies that perform marketing services on our behalf or to other financial institutions with which we have joint marketing arrangements:

- Information such as your name, your address, your social security, your asset level and/or income level and other data which we receive from you on applications and other paperwork.
- Information which we know concerning your transactions with us, our affiliated or others, such as your account balance, your credit history and/or payment history

## **Your Right to Opt Out**

If you prefer that we not disclose non-public information about you to non-affiliated third parties, you may opt out of those disclosures, that is, you may direct us to not make those disclosures other than the disclosures permitted by law. If you wish to opt out disclosures to non-affiliated third parties, you may call our firm at 610-344-9300 or you may contact us by email at [contact@trinityadvisorsgroup.com](mailto:contact@trinityadvisorsgroup.com)

## **Confidentiality and Security**

We at Trinity Investment Advisors, LLC restrict access to non-public person information about you to those employees who need to know that information about you to those employees who need to know that information to provide products or services to you. We maintain physical, electronic and procedural safeguards that comply with federal standards to protect your non-public personal information.