

At TriCord Advisors, Inc., we are committed to protecting the privacy and confidentiality of our clients' personal information. This Privacy Policy outlines how we collect, use, and safeguard your information and explains your rights regarding your data.

1. Information We Collect

We may collect the following types of personal information not limited to:

- Names, Date of Birth, and Social Security Numbers.
- Phone Numbers, Address, and Employment History.
- Banking Details, Estate Planning Information, and Marital Status.

2. How We Collect Information

We gather information through:

- Online forms completed via our website or tools.
- In-person consultations and meetings.
- Financial management tools used during our services.

3. Use of Collected Information

The information collected is used to provide robust Wealth Management Services, including:

- Investment planning and management.
- Financial compliance and reporting.
- Personalized support and client relationship management.

4. Text Message Communications

By providing your phone number, you consent to receive text messages from TriCord Advisors, Inc., including updates, reminders, and other communications related to our services.

- **Opting In:** Clients may opt into receiving text messages by providing their phone number and agreeing to receive such communications.
- **Opting Out:** You can opt out of text message communications at any time by replying "STOP" to any text message from us. Alternatively, you can contact us directly to update your communication preferences.

Standard messaging and data rates may apply.

5. Sharing of Information

We only share personally identifiable information (PII) with third parties at the explicit request of our clients.

TriCord Advisors does not sell or rent your data to any third-party entities.

6. Data Security

We prioritize the security of your personal information and employ:

- Advanced encryption protocols to safeguard sensitive data.
- Firewalls and secure networks to prevent unauthorized access.

7. Your Rights

You have the right to:

- Access and review the personal information we hold about you.
- Request corrections to inaccurate or incomplete data.
- Request the deletion of your data, subject to applicable laws.

To exercise these rights, please contact us using the information provided below.

8. Compliance with Laws

TriCord Advisors, Inc. complies with all applicable laws and regulations governing the privacy and security of personal information.

9. Updates to this Privacy Policy

We may update this Privacy Policy from time to time to reflect changes in our practices or legal requirements. Any updates will be posted on our website, and the "Effective Date" at the top will be revised.

10. Contact Us

If you have any questions or concerns about this Privacy Policy or your data, please contact us at:

- Phone: 951-684-7011
- Email: contact@tricordadvisors.com