



Christopher Weil & Company, Inc.  
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## IMPORTANT INFORMATION

### *about your privacy*

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*Christopher Weil & Company, Inc. along with its affiliate companies has a long-standing policy of protecting the confidentiality and security of non-public information that is collected about our customers. We know that you expect us to conduct and process your business in an accurate and efficient manner while protecting your privacy.*

*This Privacy Policy applies to all prospective, current and recent clients who have developed a relationship with Christopher Weil & Company, Inc. or its affiliated companies and applies to all products and services provided to you.*

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**Christopher Weil & Company, Inc.** ("CWC") has a long-standing policy of protecting the confidentiality and security of non-public information that we collect about our customers. We know that you expect us to conduct and process your business in an accurate and efficient manner. To do that, we must collect and maintain certain personal information about you. This Privacy Policy Notice describes the types of non-public information we collect about you; the ways we safeguard the confidentiality of this information; when this information may be shared with others and how you may limit the sharing of your non-public personal information. We will not share non-public information about you with third parties without your consent, except for the specific purposes described below. This Privacy Policy applies to prospective, current and recent clients who have developed a relationship with CWC and its affiliated companies. When, or if, we no longer provide services to you, CWC will continue to adhere to the Privacy Policies and practices as described in this notice. This Privacy Policy applies to products and services provided by CWC used primarily for personal, family or household purposes.

**Non-Public Information We Collect:** In order to provide you with products and services and maintain our relationship with you, we collect certain non-public information. We obtain this personal information from a number of sources. Applications and documents you submit to us provide CWC with information like your name, address, telephone numbers, Social Security numbers, assets, income and investment objectives. Further, in dealings and transactions with our affiliates or others CWC may obtain information about account balances, your use of account(s), the types of products and services you prefer, finances, employment, avocations or other personal characteristics through these exchanges.

**Non-Public Information We Disclose to Others:** CWC may disclose some personal information we collect as described above, to companies that perform services on your/our behalf. An example is our sharing with JP Morgan Chase or Fidelity Investments when they provide clearing and reporting services for your account(s). We also disclose information when we believe it necessary for the conduct of our business or where law requires. For example, information may be disclosed for audit or research

purposes, to attorneys or other professionals, or regulatory agencies. In addition we may provide non-public information to third party service providers to (a.) enable them to provide business services for us such as performing data maintenance or processing services, to (b.) facilitate the processing of transactions requested by you and to (c.) assist us in offering products and services to you. We may disclose to our affiliated companies (CWC Asset Advisors, Inc. and Storage Managers, Inc.) some non-public personal information. Offers for products and services from our affiliate companies are developed under conditions designed to safeguard your privacy and we require these companies to adhere to our firm's privacy standards when handling your personal information. Except in these specific, limited situations we will not make any disclosures of non-public information, without your consent, to other companies or individuals who may want to sell their products or services to you.

**You May Limit Information We Share:** If you prefer that we do not share your non-public personal information with our affiliated companies you may direct us not to share such information ("**opt out**") by:

**Calling us at (800) 355-9345 from 7am to 4 pm  
or by writing to us at Christopher Weil & Company, Inc.,  
12555 High Bluff Drive, Suite 180  
San Diego, CA 92130**

Your written request should include your name, address, telephone number and account number(s). Please understand that if you direct us not to share information with our affiliated companies, you, and any joint account holders, may not receive information about products and services that could help you manage your financial resources and achieve your investment objectives. Your "opt out" preference will remain in effect until you notify us otherwise. If you have questions about this Privacy Policy or if you want to review or correct files that we may maintain about you, contact us at **(800) 355-9345**.

**Confidentiality and Security:** CWC uses physical, electronic and procedural security measures to safeguard your non-public information. Access to such information is restricted to those employees who are trained in the proper handling of client information and they may access information only when there is an appropriate reason to do so, such as to administer our products or services, or where disclosure is required by law.

**Changes to Privacy Policy:** CWC reserves the right to change this Privacy Policy. The examples we have used in this policy statement are illustrations and are not intended to be exclusive. This notice complies with the Federal Gramm-Leach-Bliley Act and the Securities and Exchange Commission regulation regarding privacy. You may have additional rights under other foreign or domestic laws that may apply to you.

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**AFFILIATES**

CWC Asset Advisors, Inc.  
Storage Managers, Inc.