



Privacy Policy Statement

FACTS

WHAT DOES EPIC TRUST INVESTMENT ADVISORS, LLC (“Epic Trust”) DO WITH YOUR PERSONAL INFORMATION?

Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> ▪ Social Security Number ▪ Employment Information ▪ Retirement Assets ▪ Transaction History ▪ Investment Experience ▪ Risk Tolerance ▪ Account Balances ▪ Wire Transfer Instructions ▪ Income <p>When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p>
How?	All financial companies need to share your personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers’ personal information; the reasons Epic Trust chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Epic Trust share?	Can you limit this sharing?
For our everyday business purposes – Such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our internal marketing purposes – to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	We don’t share
For our affiliates’ everyday business purposes – information about your transactions and experiences	Yes	No
For our affiliates’ everyday business purposes – information about your creditworthiness	No	We don’t share
For our affiliates to market to you	No	We don’t share
For nonaffiliates to market to you	No	We don’t share

Questions?Call 509.591.0014 or go to www.EpicTrustIA.com.**Page 2**

Who we are	
Who is providing this notice?	<i>Epic Trust Investment Advisors, LLC</i>
What we do	
How does Epic Trust protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. Our service providers are held accountable for adhering to strict policies and procedures to prevent any misuse of your nonpublic personal information.
How does Epic Trust collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ▪ Open an account ▪ Enter into an investment advisory contract with us ▪ Give us your income information ▪ Make deposits to or withdrawals from your account ▪ Make a wire transfer ▪ Tell us where to send money ▪ Tells us who receives money ▪ Show your government-issued ID ▪ Seek advice about your investments We may also collect your personal information from other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> ▪ Sharing for affiliates' everyday business purposes – information about your creditworthiness ▪ Affiliates from using your information to market to you ▪ Sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing.
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ <i>Our affiliates include Epic Advisor Tech, Inc; Epic Trust AZ, LLC; Integrated Accounting Services, LLC; ProActive Tax Consulting and Northwest Insurance Alliance, LLC.</i>
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies <ul style="list-style-type: none"> ▪ <i>Epic Trust does not share with nonaffiliates.</i>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ▪ <i>Epic Trust does not jointly market.</i>
Other important information	

Epic Trust is located at 1305 Fowler Street | Suite 2C | Richland, WA 99352 | Telephone 509.591.0014