



PRIVACY POLICY

Effective: July 27, 2026

Our Commitment to You

Our relationship with you is our most important asset. We understand that you have entrusted us with your private information, and we are committed to safeguarding the use of any personal information we obtain as your Financial and/or Investment Advisor.

We do not sell your non-public personal information. We protect the security and confidentiality of personal information and we have controls in place to ensure that such information is discretely used for proper business purposes in connection with the management or servicing of our relationship with you.

How We Protect Your Information

To safeguard your personal information from unauthorized access and use, we maintain physical, procedural, and electronic security measures including encrypted file storage, secure passwords, secure office environments, vendor security requirements, and employee training. Our technology vendors are required to protect the personal nonpublic information they receive from us by providing security and access control over personal information and having policies regarding the transmission of data

Types of Nonpublic Personal Information We Collect

We collect information provided by you or obtained with your authorization, including Social Security numbers, dates of birth, banking information, account numbers, balances, and income sources.

Information Disclosure and Your Rights

As an investment adviser, there are situations where we may need to share non-public information to run our everyday business. In the section below, we list the most common reasons we may share your personal information. We are required by law to

inform you of our policies regarding privacy and client information as well as to inform you regarding how we collect, share, and protect your personal information. Federal law gives you the right to limit some but not all sharing of personal information by “**opting-out**”.

Reason for Sharing	Description	Can You Limit?
Servicing Clients	Processing transactions, account maintenance, tax planning, record keeping, regulatory requests	No
Marketing	SEED does not share information for marketing purposes	Not Shared
Authorized Users	Share with authorized representatives	Yes
Former Clients	Information is not shared with non-affiliated third parties	Not Shared

Changes to Our Privacy Policy

We will notify clients of any material changes.

Questions, Concerns or Opt-Out Requests

You may “opt out”, ask questions or voice any concerns, as well as obtain a copy of our current Privacy Policy by contacting us at (607) 217-5091 or by email at info@SEEDPG.com
