



## *Privacy Policy*

This statement governs our privacy policies with respect to our Clients who conduct business with us as well as those who interview with us without becoming Clients.

*“Personally Identifiable Information”* refers to any information that identifies or can be used to identify, contact, or locate the person to whom such information pertains, including, but not limited to, name, address, phone number, fax number, email address, financial profiles, Social Security Number or driver’s license information.

*What Personally Identifiable Information is collected?* We collect all contact information, as well as governmental identification such as Social Security Numbers and driver’s license information. We also collect net worth, income, employment information and other financial data pertinent to the financial planning process.

*What organizations are collecting the information, and how do we use Personally Identifiable Information?* Quarry Hill Advisors, LLC collects all information from you. We collect information required by the custodians of your investments (i.e. Charles Schwab) and the information we are required to have by law, the Securities and Exchange Commission (SEC) and the CFP Board of Standards. To the extent that you provide Quarry Hill Advisors, LLC with your email address, it will be added to Quarry Hill Advisors’ electronic newsletter mailing list. You may opt out at any time by calling Quarry Hill Advisors at 612-440-0318 or clicking at any time the “unsubscribe” link on the electronic newsletter.

*With whom may the information be shared?* The only parties with access to your Personally Identifiable Information are your custodian (i.e. Charles Schwab) the third-party reporting systems Quarry Hill Advisors, LLC utilizes (Orion, ByAll Accounts), the electronic newsletter program used (Mailchimp), and Quarry Hill Advisors, LLC. We share your Personally Identifiable Information with no outside parties for any reason other than a direct request from you, our Client.

*How is Personally Identifiable Information stored?* Personally Identifiable Information is stored in a secure, encrypted cloud-based vault via encrypted devices with additional 256-bit encryption at the file level.

*What happens if the Privacy Policy changes?* The nature of the Financial Planning Industry calls for very high privacy standards for our Clients’ information. If industry standards change in the future, we will contact our Clients before any changes are made.