Dorman Skorheim Wealth Management, LLC

Customer Privacy of Information Policy

We are committed to protecting your confidential information. We do not provide any information to unrelated companies for the purpose of marketing their products or services to our customers.

When you establish a relationship with us, you are requested to furnish personal and financial information used to assist in assessing your investment objectives and goals. The information you share with us is often private and confidential, and we are therefore committed to its protections. In addition to the information collected, during the course of our relationship we may also collect a variety of nonpublic personal information from other sources. The confidential information we collect may include the following:

1. Information we receive from you, such as your name, address, social security number, assets, income, investment objectives and other information as required by Industry Regulators.
2. Information about your transactions, including balances, portfolio holdings, cash balances, margin balances, and customer statements. Also included may be portfolio evaluations.
3. Information we receive from unaffiliated custodians, your accountant, attorney or other professional obtained by you.
4. Medical or health information that you the customer authorize us to receive from doctors or other health care providers and medical vendors in relation to the advice provided on a traditional or variable life policy.

Dorman Skorheim Wealth Management does not share customer information with any third party other than those that are authorized by you or that are required in order for us to provide services agreed upon by the client, service an account, execute a transaction, or if required to do so by regulation or law. We may share information with an unaffiliated custodian as is necessary to provide advisory services.

Dorman Skorheim Wealth Management has established policies to maintain physical, electronic, and procedural safeguards to maintain the confidentiality of the personal information of our customers. Appropriate measures are taken to ensure that access is available to those individuals who need to know that information in order to provide our products and services.

Each client will be provided with a copy of the advisor's Privacy Notice upon opening his/her account. In addition, each active client of the advisor will be provided with a copy of the Privacy Notice annually.