



Client Information Privacy Notice

InvesTrust Consulting, LLC is engaged in providing investment consulting to clients, and as such, collects client information regarding those clients. The company recognizes the importance of our client's privacy expectations. We are committed to maintaining the confidentiality, integrity and security of all client information entrusted to us. This Privacy Statement describes the non-public client information we collect and the circumstances under which we may share it with others who are not affiliated with InvesTrust Consulting.

Collection of Client Information

InvesTrust Consulting collects non-public client information about its clients from the following sources:

- Information InvesTrust Consulting receives from clients in any form including on the Advisory Agreement or other forms completed by client; and
- Information about clients' transactions with InvesTrust Consulting, entities advised by InvesTrust Consulting or its affiliates or third party information InvesTrust Consulting receives to service clients' accounts.

Disclosure of Client Information

InvesTrust Consulting does not reveal specific information about client accounts or other identifiable data to unaffiliated third parties or companies for their independent use unless: 1) there is a client request or authorization; 2) the information is provided to help complete a transaction initiated by client; or 3) the disclosure otherwise is lawfully required. *We do not provide client information to unaffiliated third parties or companies for the purpose of independent telemarketing or direct mail marketing of any products or services of those companies.*

Security of Client Information

InvesTrust Consulting maintains office security to ensure that client information is not placed at unreasonable risk of disclosure. InvesTrust Consulting restricts access to non-public information about its clients to those employees who need to know the information to provide products and services. The Firm maintains physical, electronic, and procedural safeguards that protect our clients' non-public information. InvesTrust Consulting's agreements with unaffiliated third parties require that strict confidentiality be maintained for clients' non-public client information. Federal and state securities regulators may review the Firm's records and clients' records as permitted by law. Identifiable information about clients will be maintained while a client relationship continues and for the subsequent period of time that records are required to be maintained by law. After that time the information may be destroyed. The destruction of such information will be done in a manner reasonably designed to protect nonpublic client information.

Procedures to Opt Out of Disclosure

Clients may opt out of InvesTrust Consulting's sharing nonpublic client information with nonaffiliated third parties contacting the Chief Compliance Officer, Shannon Carter, at 405-843-7046. Please note that, even if you direct us not to share this information, we may still have to disclose your nonpublic information as permitted by law, for example, to process transactions or to service your account. If you have any questions, please contact the Chief Compliance Officer.