



**KOBREN INSIGHT MANAGEMENT**  
An Adviser Investments Company

## PRIVACY POLICY

As part of our compliance with the provisions of certain privacy regulations issued by the United States federal government, we are required to provide you with notice of our policies and practices relating to the use and sharing of your personal information.

This policy describes the steps we have taken to safeguard your information and what client information we may share with others.

We collect the following types of nonpublic personal information about you:

- Information we receive from you to open an account or provide investment advice to you (such as information on applications); and
- Information about your transactions with us, our affiliates, or others that we may receive from third parties (such as trade memoranda, account statements and confirmations).

We restrict access to nonpublic personal information about you to our employees, affiliates and service providers who need to know that information to provide products and services to you.

We maintain physical, electronic and procedural safeguards that we believe are reasonably designed to guard your nonpublic personal information while it is within our control.

We have not and will not sell your nonpublic personal information to anyone, even if our formal relationship ends.

We do not disclose any nonpublic personal information about our Clients or former Clients to anyone, except to our employees, affiliates and services providers and as permitted by law and in accordance with any applicable investment management agreements or subscription agreements.

For additional questions concerning our Privacy Policy, please contact us by:

Phone at 1-800-492-6868; or E-Mail at [AI-policy@adviserinvestments.com](mailto:AI-policy@adviserinvestments.com)