

Privacy Policy

At Samrah Advisory Services (SAS), your privacy is our priority. We may need to gather personal information to open account(s), process transactions and to provide the highest level of service and advice. We do not sell your personal information to anyone. We protect the security and confidentiality of all personal information. All electronic data communication is password protected.

We understand that you have entrusted us with your confidential and private financial information so we employ a normalized relational data base with the best information technology and well-established procedures to maintain and secure your data accurately. How your personal information is collected and used is set forth in the below policy.

Samrah Advisory Services Privacy Policy

The Samrah Advisory Services (SAS) privacy policy applies to current and former SAS clients, prospective clients and the company web sites.

1. Your personal information is not sold and we do not disclose personal information to third parties, except:

We disclose personal information to companies such as Charles Schwab & Co., Inc. that help us in the execution of trades and the servicing of your account(s). We may disclose or report personal information in limited circumstances where we believe in good faith that disclosure is required under law, for example, to cooperate with regulators or law enforcement authorities. But for these exceptions, we will not share your personal information with third parties unless we receive your written consent.

2. Personal information is collected in the normal course of business in order to manage your accounts and provide advice.

A) Application and registration information: We collect information that you provide to us when you open an account. The information collected may include name, address, phone number, email address, social security number, and information about your investment accounts, expectations and past experience.

B) Web site usage: We collect information on the SAS web site through the use of "cookies." For example, we may identify the pages on our web site that your browser requests or visits. This information is only personally identifiable if you have chosen to identify yourself.

C) Transaction information: SAS maintains historical information related to account performance, transaction history, account balances, and portfolio positions and may include your name in an internal client list that reflects your activities at SAS.

Samrah Advisory Services Privacy Policy (Con't)

3. Your personal information is used to fulfill our regulatory obligations.

4. We protect the confidentiality and security of your personal information.

A) When support services are provided by companies that we engage, they are not allowed to use your personal information for their own purposes and are contractually obligated to maintain strict confidentiality. We limit their use of your personal information to the performance of the specific service we have requested.

B) We restrict access to personal information to our employees and agents for business purposes only. All employees are trained and required to safeguard such information.

C) We maintain safeguards to guard your personal information.

5. We make every effort to keep your personal information accurate and up to date.

If you need to make a change to your information, please contact us so that we may promptly update our records.

6. We will provide notice of changes in our information-sharing practices.

If, at any time in the future, it is necessary to disclose any of your personal information in a way that is not consistent with this policy, we will give you advance notice of the proposed change so that you will have the opportunity to opt-out of such disclosure.

Contact: Tim Atkinson
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