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| Facts | WHAT DOES FINANCIAL INSIGHTS, INC. DO WITH YOUR FINANCIAL INFORMATION? |
| Why? | Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do. |
| What? | <p>The types of personal information we collect and share depends on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> • Social Security number and income • Account balances and assets • Transaction history |
| How? | All financial companies need to share customers’ personal information to perform their services and run their everyday business. In the section below, we list the reasons financial companies can share their customers’ personal information; the reasons Financial Insights, Inc. chooses to share; and whether you can limit this sharing. |

| Reasons we can share your personal information | Can you limit this sharing? | |
|--|-----------------------------|----------------|
| For our everyday business purposes — such as to process your transactions, maintain your account(s) or respond to court orders and legal investigations | Yes | No |
| For our marketing purposes — to provide you with newsletters and other documents, and announcements regarding our services. | No | Not Applicable |
| For joint marketing with affiliates | No | Not Applicable |
| For joint marketing with non-affiliates | No | Not Applicable |
| For our affiliates’ everyday business purposes — information about your transactions, accounts, etc. | No | Not Applicable |
| For non-affiliates’ (accountants, attorneys and other business professionals) everyday business purposes — in order to ensure appropriate information is required for tax purposes, or for tax planning or estate planning or asset protection planning purposes. | No | Not applicable |
| For our affiliates to market to you | No | We don’t share |
| For our non-affiliates to market to you | No | We don’t share |

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| Questions? | (253) 627-6010 |
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| Who we are | |
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| Who is providing this notice? | Financial Insights 1551 Broadway, Suite 600 Tacoma, WA 98402 |
| What we do | |
| How does Financial Insights, Inc. protect my personal information? | To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards (such as password protection or encryption) and restricting access to physical files (such as locked cabinets or building). |
| How does Financial Insights, Inc. collect my personal information? | <p>We collect your personal information, for example, when you:</p> <ul style="list-style-type: none"> • Open an account • Deposit money • Seek advice about your investments • Enter into an investment advisory contract • Provide us with information about your investment or retirement portfolio or earnings <p>We may also collect your personal information from other companies.</p> |
| Why can't I limit all sharing? | <p>Federal law gives you the right to limit only:</p> <ul style="list-style-type: none"> • Sharing for affiliates' everyday business purposes • Affiliates from using your information to market to you • Sharing for non-affiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing.</p> |
| What happens when I limit sharing for an account I hold jointly with someone else? | Your choices will apply to everyone on your account – unless you tell us otherwise. |
| Definitions | |
| Affiliates | Companies related by common ownership and/or control. They can be financial and nonfinancial companies. |
| Non-affiliates | Companies not related by common ownership and/or control. They can be financial or nonfinancial companies. |
| Joint marketing | A formal agreement between non-affiliated financial companies that together market financial products or service to you. |