

# PRIVACY & POLICY

seymourams

Prepared For :  
seymourams Investors

# Privacy & Policy

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## PROJECT DESCRIPTION

At Seymourams Asset Management, your privacy is our priority. As a Registered Investment Advisor (RIA), we are committed to safeguarding the personal and financial information you share with us. This Privacy Policy explains how we collect, use, protect, and disclose your information, in full alignment with our fiduciary duty and regulatory obligations.

## INFORMATION WE COLLECT

We collect non-public personal information about you to provide strategic investment management services tailored to your financial goals. This information may include:

- Full name, address, email, and phone number
- Social Security number or Tax ID
- Financial account numbers and balances
- Investment history, goals, and risk preferences
- Income, net worth, and employment information
- Documents such as tax returns, wills, or trust agreements (where applicable)

## HOW WE COLLECT YOUR INFORMATION

We collect your information through:

- Direct interactions (via account applications, financial planning questionnaires, meetings, etc.)
- Custodians, banks, or financial institutions that you authorize
- Third-party service providers or platforms used for data aggregation or financial analysis
- Secure digital tools used on our website or client portals

## HOW WE USE YOUR INFORMATION

We use your personal data to:

- Deliver personalized financial planning and investment management services
- Communicate important updates, reports, and account information
- Comply with legal, regulatory, and compliance obligations
- Improve our services and operational efficiency
- Safeguard your assets and prevent unauthorized access

## INFORMATION SHARING AND DISCLOSURE

Seymourams Asset Management does not sell or rent your personal information to anyone. We may share your information with:

- Authorized third-party service providers (e.g., custodians, compliance consultants, financial software providers)
- Legal or regulatory authorities when required by law
- Accountants, attorneys, or other professionals, only with your consent

All third parties are contractually obligated to maintain the confidentiality and security of your information.

## SECURITY AND DATA PROTECTION

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## **CHANGES TO THIS PRIVACY POLICY**

Seymourams Asset Management reserves the right to update or modify this Privacy Policy at any time. Any material changes will be communicated directly to clients or reflected on our website with an updated effective date.

## **INFORMATION SHARING AND DISCLOSURE**

Seymourams Asset Management does not sell or rent your personal information to anyone. We may share your information with:

- Authorized third-party service providers (e.g., custodians, compliance consultants, financial software providers)
- Legal or regulatory authorities when required by law
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