

# HOHIMER

## WEALTH MANAGEMENT

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### **Privacy Policy**

*Hohimer Wealth Management is committed to client confidentiality and the protection of your privacy.* The following information is provided, as required by law, to help you understand our privacy policy and how we will handle and maintain confidential personal information as we fulfill our obligations to protect your privacy. "Personal information" refers to the non-public financial information obtained by Hohimer Wealth Management in connection with carrying out our services.

#### **Information We Collect**

Hohimer Wealth Management collects personal information as part of our relationship to you, to provide client services and fulfill legal and regulatory requirements. The type of information Hohimer Wealth Management collects may include:

- Information Hohimer Wealth Management receives from you on forms (such as name, address, Social Security number, profile documents, assets and income);
- Information you provide Hohimer Wealth Management directly about your personal finances or personal circumstances or which Hohimer Wealth Management may receive from brokerage statements or other information you authorize Hohimer Wealth Management to receive.

#### **Information Disclosed In Administering Products and Services**

Hohimer Wealth Management will not disclose personal information about current or former clients to non-affiliated third-parties except as permitted or required by law. Hohimer Wealth Management does not sell any personal information about you to any third-party. Hohimer Wealth Management will not disclose personal information without your authorization, except as required or permitted by law.

#### **Procedures to Protect Confidentiality and Security of Your Personal Information**

Hohimer Wealth Management has procedures in place that limit access to personal information to those employees who need to know such information in order to perform business services. In addition, Hohimer Wealth Management maintains physical, electronic and procedural safeguards to guard your non-public personal information.

Hohimer Wealth Management will update its policy and procedures when necessary to ensure that your privacy is maintained and that Hohimer Wealth Management conducts business in a way that fulfills our commitment to you. If Hohimer Wealth Management makes any material changes in its privacy policy, we will make that information available to clients through our Web site and/or other communications.