

Toyer Investment Advisors, LLC

Client Privacy Notice

Effective Date: January 1, 2023

Our Commitment to Your Privacy

At Toyer Investment Advisors, LLC, we respect your privacy and take our obligation to protect your personal information seriously. This notice explains how we handle the nonpublic personal information ("NPI") of our clients.

Information We Collect

We collect personal and financial information to provide investment advisory services, such as:

- Name, address, and contact information
- Social Security number or taxpayer identification number
- Financial account numbers and balances
- Income, assets, and investment objectives
- Information from account custodians or other financial institutions

Information We Share

We do **not sell** your information. We share NPI only as permitted or required by law, including:

- With your account custodian (**Interactive Brokers**) to service and maintain your accounts
- With regulators or auditors to comply with legal obligations
- With professional service providers (e.g., compliance consultants, attorneys) under confidentiality agreements

We do **not** share your personal information with non-affiliated third parties for marketing purposes.

How We Protect Your Information

We maintain strict physical, electronic, and procedural safeguards to protect your information, including:

- Secure access controls and encryption
- Employee confidentiality agreements and training
- Vendor oversight for systems and data security

Your Rights

Because we do not share NPI beyond what is permitted by law, **no opt-out action is required**. You may, however, contact us at any time to review or correct your personal information.

Contact Us

Toyer Investment Advisors, LLC
Attn: Rob Toyer, Compliance Officer

1123 E 5th St
Arlington, WA 98223
Phone: (425) 760-3395
Email: rob@toyertax.com

Annual Notification

We provide this Privacy Notice initially and annually, as required by federal and Washington State privacy regulations. We will notify you of any material changes to our privacy practices.