

2024 Integrated Investment Strategies, Inc Privacy Policy

Integrated Investment Strategies, Inc. is committed to respecting the individual privacy of our consumers. In accordance with federal regulations, Integrated Investment Strategies, Inc. is giving you this notice to disclose how we use information about you or your account(s).

As an Integrated Investment Strategies, Inc. client, you have entrusted to our care your personal and financial data. We recognize that your relationship with us is based upon trust, and that you expect us to act responsibly and in your best interest. Because your personal and financial data is your private information, we hold ourselves to the highest standards in its safekeeping and use. This means most importantly, that we do not sell client information — whether it is your personal information or the fact that you are an Integrated Investment Strategies, Inc. client — to anyone. Instead, we use your information primarily to provide you with financial advice, to complete transactions that you request, or to make you aware of other services.

We obtain non-public personal information from the following sources:

Information we receive from you or your representative, such as information on applications or other forms that may include your name, address, social security number, birth date, assets, income, and accounts at other institutions.

Information about transactions with us, such as your account balance and investment activities.

Information we receive from your other professional advisors.

We do not sell information about current or former clients or their accounts to third parties. Nor do we share such information, except when needed to complete transactions at your request. Here are the details:

To complete certain transactions or to provide you with the financial information or services that you request or authorize, it may be necessary for us to provide nonpublic personal information to companies, individuals, or groups that are not affiliated with Integrated Investment Strategies, Inc. For example, the implementation and administration of your portfolio may require Integrated Investment Strategies, Inc. to provide nonpublic personal information to your other advisors, such as your accountant.

In certain instances, we may contract with non-affiliated companies to provide services for us. Where necessary, we will disclose information we have about you to these third parties. In all such cases, we provide the third party with only the information necessary to fulfill its assigned responsibilities and only for that purpose.

Finally, we will release information about you if you direct us to do so, if we are compelled by law to do so, or in other legally limited circumstances. For example, we may share personal information about you to: protect your account(s) from fraud, respond to a subpoena, or service your account(s).

We maintain strict physical, electronic, and procedural safeguards to comply with federal standards to guard your nonpublic personal information.

As required by federal law, we will notify you of our privacy policy annually. We reserve the right to modify this policy at any time, but you may rest assured that if we do change it, we will notify you promptly. If you have questions pertaining to this Notice, please contact us at daniel@investiis.com.