



Client Information Privacy Policy

Eide Bailly Advisors, LLC., and Eide Bailly Agency, LLC. are wholly owned by Eide Bailly LLP. Eide Bailly Wealth is a marketing name only.

Eide Bailly Wealth (“we”) are committed to maintaining the confidentiality, integrity and security of personal information that we collect and maintain as a result of our business practices which is entrusted to us by you, our client. When you provide personal information to us, we believe that you should be aware of our policies to protect the confidentiality of that information.

The following information summarizes our privacy policy.

We collect nonpublic personal information about you for the purpose of providing and offering products and services to you. The types of information we may collect include:

- Information we may receive from you for applications or other documents, such as your name, address, social security number, assets, income and health information.
- Information about your investment history including your transactions with us and our affiliated companies.
- Information you authorize us to obtain from others, such as consumer credit and medical information.

We may share personal information about you with our affiliates or third parties that need to know your information in order to assist us in servicing your account or accounts and processing transactions you request. However, our contractual arrangements with these service providers require them to regard your information confidentially.

We may share personal information about you with affiliates to offer, recommend or provide further products and services to you.

We do not sell information about current or former clients to third parties, nor do we disclose any nonpublic personally identifiable information about our prospects, clients or former clients to anyone, unless requested to do so by a client or client representative or, if necessary, in order to process a transaction, service an account or as permitted by law. We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with regulatory guidelines. To guard your personal information, we maintain physical, electronic and procedural safeguards that comply with regulatory procedures and standards.

We are committed to maintaining the confidentiality, integrity and security of personal information we have about you. To meet that commitment, we maintain policies, procedures and safeguards to protect the information we collect about you and we limit how that information is shared in accordance with the policies described above. And because we already limit the sharing of your nonpublic personal information as outlined above, no action is necessary on your part to limit such sharing.

If you wish to opt out of sharing or limit sharing further, please call 866-740-4100 or contact your Advisor. If we change our privacy policy and practices, we will provide a written notice to you.

What inspires you, inspires us. | eidebaillywealth.com

Corporate Office Address | 4310 17th Ave. S. | P.O. Box 2545 | Fargo, ND 58108-2545 | TF 866.740.4100 | EOE

Eide Bailly Advisors, LLC., and Eide Bailly Agency, LLC., are wholly owned and operated by Eide Bailly LLP.