

Overview

Protecting the privacy and security of your personal information is a top priority for Partnervest. This Privacy Policy describes the privacy practices of Partnervest Financial Group LLC, and its affiliates, collectively known as Partnervest.

Highlights

- Your non-public personal information is confidential
- Information security is a priority at Partnervest
- We do not sell information to third parties
- We do not share your non-public personal information with outside parties except as necessary to service your account and as permitted or required by law

How We Gather Your Information

In the course of doing business with Partnervest, you share personal and financial information with us. We treat this information as highly confidential and are committed to protecting the privacy and security of it.

You may provide information when communicating or transacting with us in writing, electronically, or by phone. For instance, information may come from applications, requests for forms or literature, and your transaction and account positions. On occasion, such information may come from consumer reporting agencies and those providing other services to us.

How We Protect and Use Your Information

We maintain safeguards and enforce our code of ethics to insure that your personal information is held in confidence. We do not sell information about current or former customers to third parties. We only share information about our customers within the Partnervest family of companies and with certain third party service providers that assist us in servicing your accounts. All third party service providers are required to protect the privacy of your information. In the event that your representative leaves Partnervest, we may provide your personal information to the Representative and his/her new firm in order to facilitate the transfer of your accounts to the new firm so that you may continue to be served by your Representative. We only disclose information as permitted or required by law.

Notice (Required by Regulation)

If you do not want us to share information, other than required by law, with third parties, please clearly indicate your request in writing. If you wish confirmation of receipt of your request, then enclose a self-addressed stamped envelope. If you have questions concerning this or other Partnervest policies, please call your investment representative.

Annual Offer

If you would like to receive a copy of Partnervest Advisory Services LLC's Form ADV Part II disclosure document, please send a written request to: Partnervest Advisory Services LLC, Attn: Annual Offer, P.O. Box 1902, Santa Barbara, California 93102.