MontVue
CAPITAL MANAGEMENT

PRIVACY POLICY NOTICE

MontVue Capital Management has adopted this privacy policy with recognition that protecting the privacy and security of the personal information we obtain about our clients is an important responsibility. We also know that our clients expect us to service you in an accurate and efficient manner. To do so, we must collect and maintain certain personal information about you. We want you to know what information we collect and how we use and safeguard that information.

INFORMATION WE COLLECT: We collect certain nonpublic information about you ("Client Information"). The essential purpose for collecting Client Information is to allow us to provide advisory services to you. Client Information we collect may include, but is not limited to:

- Information that you provide on applications or other forms. This Client Information may include personal and household information such as income, spending habits, investment objectives, financial goals, statements of account, and other records concerning your financial condition and assets, together with information concerning employee benefits and retirement plan interests, wills, trusts, mortgages, and tax returns.
- Identifying information such as client name, age, address, date of birth, social security number, etc.
- Information about client transactions with us or others (e.g., broker-dealers, clearing firms, or other chosen investment sponsors).
- Information we receive from consumer reporting agencies (e.g., credit bureaus), as well as other various materials we may use to provide an appropriate recommendation or to fill a service request.

SECURITY OF YOUR INFORMATION: To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards and secured files and building.

INFORMATION WE DISCLOSE: We do not disclose the nonpublic personal information we collect about our clients to anyone except:

i. in furtherance of our business relationship with them and then only to those persons necessary to effect the transactions and provide the authorized services (such as broker-dealers, custodians, independent managers etc.);
ii. to persons assessing our compliance within industry standards (e.g., professional licensing authorities, consultants, etc.);
iii. our attorneys, accountants, and auditors;
iv. someone client expressly authorizes us to (i.e. your attorney, accountant, or trusted contact):
v. in use of communication tools that allow us to email about MontVue's firm and disclosures, statement notification, and/or to share pertinent articles; or
vi. as otherwise provided by law.

We are permitted by law to disclose the nonpublic personal information about a client to governmental agencies and other third parties in certain circumstances (such as third parties that perform administrative or marketing services on our behalf or for joint marketing programs). These third parties are prohibited to use or share the information for any other purpose. You can unsubscribe from emails either through the unsubscribe button at the bottom of an email (if applicable) or by calling our office to opt out.

FORMER CLIENTS: If a client decides to close their account(s) or become an inactive client, we will adhere to our privacy policies, which may be amended from time to time.

CHANGES TO OUR PRIVACY POLICY: In the event there was to be a material change to our privacy policy regarding how we use client confidential information, we will provide written notice to the client. Where applicable, the client would be given an opportunity to limit or opt-out of such disclosure arrangements.

QUESTIONS: Please call 434-455-2795 if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.