

Privacy Policy

The Chartist, Inc. is committed to safeguarding the confidential information provided to us by our advisory clients.

We collect nonpublic personal information about you from the following sources: interviews and other conversations between you and our representatives, applications and other documents provided to us by you, information about your transactions with us, our affiliates, and others; and information we receive from consumer reporting agencies. Whether we have collected information from each of these sources about you depends on the scope of our engagement with you.

We do not disclose any nonpublic personal information about any of our current advisory clients, except as permitted by law. A type of disclosure that is permitted by law is a disclosure that is necessary to effect, administer, or enforce a transaction that you request or authorize. Other disclosures that are permitted by law are disclosures to our accountants, auditors, and lawyers, disclosures to the regulators that examine our business, and disclosures that you specifically request.

We do not provide information about our current advisory clients to mailing list vendors or solicitors for any purpose. The Chartist may make its former advisory client's U.S. postal address available to a few carefully screened companies whose products may be of interest. If you prefer not to receive such mailings, contact us at 800-786-8916, and we will promptly remove your name from our shared list. We restrict access to nonpublic personal information about you to those employees who have a business or professional reason to need to know that information. In addition, we maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk.

It is the policy of The Chartist, Inc. (the "Firm") to protect through administrative, technical, and physical safeguards, the security and confidentiality of financial records and other nonpublic personal information concerning its clients and persons who have applied to be clients ("Clients"). Employees may not disclose the identity, affairs, investments, or other personal information of any Client to anyone outside the Firm, except such information as may be disclosed with the permission of the Client or required to be disclosed in conjunction with servicing the Client's account (such as to a brokerage firm at which a client's account is held) or for the business of the Firm (such as to the Firm's auditors and lawyers).

At times, the Firm may enter into one or more agreements with third parties, pursuant to which such third parties may be provided with access to confidential information. If this occurs, the Firm will protect the privacy of confidential information and include in the relevant agreement's provisions protecting confidential information to the extent required by law.

Please contact us at 800-942-4278 if you have any questions regarding our privacy policy.