



“THE PILOT’S ADVISOR®” LLC PRIVACY POLICY

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Introduction

At The Pilot's Advisor® LLC, we are committed to protecting the privacy and security of your personal information. This Privacy Policy outlines how we collect, use, disclose, and safeguard your information when you interact with our registered investment advisor (RIA) firm.

Information We Collect

We may collect personal information from you when you engage with our firm's services. This information may include, but is not limited to:

- Contact information (such as name, address, email address, and phone number)
- Financial information (such as assets, income, and investment objectives)
- Identification information (such as Social Security number, date of birth, and government-issued identification)
- Employment and professional information (such as occupation and employer)
- Transactional information (such as account activity and investment history)

We may collect this information through various channels, including in-person meetings, telephone conversations, email correspondence, our website, and third-party sources as permitted by law.

How We Use Your Information

We use the information we collect for the following purposes:

- To provide you with our investment advisory services and manage your investment accounts

- To communicate with you regarding your investments, account status, and other relevant information
- To personalize your experience and tailor our services to meet your specific needs and preferences
- To comply with legal and regulatory requirements, including anti-money laundering (AML) and know your customer (KYC) obligations
- To detect and prevent fraud, unauthorized access, and other unlawful activities
- To improve our services, website functionality, and overall client experience

Information Sharing and Disclosure

We may share your personal information with third parties in the following circumstances:

- With your consent or at your direction
- With our affiliates, service providers, and business partners who assist us in providing our services (e.g., custodians, broker-dealers, and financial institutions)
- As required by law, regulatory authorities, or legal process
- In connection with a merger, acquisition, or sale of assets, where permitted by law

We do not sell or rent your personal information to third parties for marketing purposes.

Data Security

We maintain appropriate technical, administrative, and physical safeguards to protect your personal information from unauthorized access, disclosure, alteration, or destruction. We regularly review and update our security measures to ensure the ongoing integrity and confidentiality of your data.

Your Choices and Rights

You have certain rights regarding your personal information, including the right to:

- Access and review your information
- Update or correct inaccuracies in your information

- Request deletion of your information, subject to legal and regulatory requirements
- Opt-out of receiving marketing communications from us

To exercise these rights or if you have any questions or concerns about our Privacy Policy, please contact us using the information provided below.

Changes to This Policy

We may update this Privacy Policy from time to time to reflect changes in our practices or legal requirements. We will notify you of any material changes by posting the updated policy on our website or contacting you directly.

Contact Us

If you have any questions, comments, or concerns about our Privacy Policy or our privacy practices, please contact us at:

The Pilot's Advisor® LLC 940 Falling Waters Lane Seneca, SC 29672 Email: ryan@pilotsadvisor.com Phone: 843-475-3038