

Patriot Investment Management Privacy Notice

Patriot Investment Management, Inc., is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us.

The categories of nonpublic information that we collect from you may include information about your personal finances, information about your health to the extent it is needed for the financial planning process, information about transactions between you and third parties. Patriot Investment Management, Inc., uses this information to help you meet your personal financial planning goals.

Only with your permission, do we disclose limited information to attorneys, accountants, and insurance agents with whom you have established a relationship. We are required to provide a limited amount of information to our discount brokerage firm, Charles Schwab & Company, in order to open accounts and execute securities transactions on your behalf.

We maintain a secure office to ensure that your information is not placed at unreasonable risk. We employ secure data techniques and authentication procedures in our computer environment.

We do not provide your personal information to mailing list vendors or solicitors.

We require strict confidentiality in our agreements with unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors. Federal and state securities regulators may review our company records and your personal records as permitted by law.

Personally identifiable information about you will be maintained while you are a client, and for the required period thereafter that records are required to be maintained by federal and state securities laws. After that time, the information may be destroyed.

We will notify you in advance if our privacy policy is expected to change. We are required by law to deliver this privacy statement to you annually, in writing.

Sincerely,

Patriot Investment Management Group, Inc.