



2010 PRIVACY DISCLOSURE DOCUMENT

Soundmark Wealth Management, LLC's primary client goal is to protect your privacy.

To conduct regular business, we may collect non-public personal information from sources such as:

- Information reported by you on applications or other forms you provide to us
- Information about your transactions with us, our affiliates, or others

However, the Firm does not share or disclose any non-public personal information about its current or former customers, except as permitted by law. All information will remain confidential. We do not and will not sell your personal information to anyone, for any reason, at any time.

Information Safeguarding: Soundmark Wealth Management, LLC (SWM) will internally safeguard your non-public personal information by restricting access to only those employees who provide products or services to you or those who need access to your information to service your account. In addition, we will maintain physical, electronic and procedural safeguards that are designed to meet federal and/or state standards to protect your non-public personal information. Our privacy policy applies to anyone who has shared information with us through our website, workshops, or phone and in-person conversations. We know that you have entrusted your financial information to us and we are committed to safeguarding your private information.

Information Collected: We may collect your personal information in a variety of ways depending on the level and type of services SWM provides for you. In order to offer the broadest range of services, we may collect the following types of information:

Web site and Web Forms: We track visitors to our website. This data allows us to provide the best service possible by helping to ensure the health of the network and services, developing and deploying new business services, researching, improving and maintaining our existing business services and providing customized services to our users. When you complete one of our online forms, we ask for data about you (name, address, email address, etc). This process is designed to help our internal staff better meet your needs. We may use, combine, or track this data with other services and features of SWM to provide a better user experience and increased functionality.

Email: We may keep records of all email communications sent to SWM. These emails may be used to provide feedback, answer questions, or service other requests.

Data: We maintain physical, electronic and procedural safeguards to protect personal information.

Sharing information: We do not disclose any non-public personal information about our current or former clients to non-affiliated third parties, except as required by law, to ensure compliance with this and other policies, to prevent and detect possible fraud or misuse of services, and to ensure the protection of imminent harm or danger to SWM or its employees or to explain our actions to professional organizations that we or our employees belong to. Some services you receive from SWM, are provided through our service providers, which include but are not limited to the custodian banks and broker-dealers of securities that you invest in. All records containing your non-public personal information are also maintained at the service providers' places of business. In the event that you hold shares of mutual funds in accounts we manage on your behalf, through a financial intermediary, such as a broker-dealer, bank or trust company, the privacy policy of your financial intermediary would govern how your non-public personal information would be shared with non-affiliated third parties.

***Policy changes:** This policy may change from time to time as necessary or required by law. Any changes will be sent to clients via US mail.