

Customer Privacy Policy

Lifemark Securities Corp. ("LMSC") is concerned about the privacy of its customers, and commits to keep the information about its customers secure and confidential. By this notice, LMSC is advising its customers of its desire to help all its customers understand how LMSC fulfills this commitment. From time to time, LMSC collects many different types of personal information about its customers, including:

Information LMSC receives from customers on applications and forms, via the telephone, in personal visits, and through websites; Information about a customer's transactions with LMSC and others (such as a customer's purchases, sales, or account balances); and Information LMSC receives from consumer reporting agencies.

LMSC does not disclose customers' nonpublic personal information to anyone, except as permitted by applicable law or regulation. For example, LMSC may share this information with others in order to process transactions for customers. LMSC may also provide this information to companies that may perform administrative services on LMSC's behalf, such as printing or mailing. LMSC will require these companies to protect the confidentiality of the LMSC customer information and to use it only to perform the services for which such companies have been required to perform for LMSC.

With respect to LMSC's internal security procedures, LMSC maintains physical, electronic, and procedural safeguards to protect LMSC's customers' nonpublic personal information, and LMSC restricts access to this information. LMSC frequently conducts business on behalf of its customers with distributors of mutual funds, variable annuities and variable life insurance, and with insurance companies. Each of these organizations can also obtain for their own purposes nonpublic personal information regarding LMSC customers. To the extent that any such information comes into the possession of LMSC, LMSC will treat all such information in accordance with this notice. All such other companies are required to provide LMSC customers with information on their own privacy policies.

If an LMSC customer decides at some point either to close the customer's LMSC account(s), or becomes an inactive customer, LMSC will continue to adhere to the LMSC privacy policies and practices with respect to all such customers' nonpublic personal information.

In the event of a Significant Business Disruption (SBD), such as a disruption to LMSC's building, business district, city, or the whole region), LMSC has a Business Continuity Plan in place so that business should not be interrupted for more than 24 to 48 hours. Backup arrangements have been put into place so that we are able to continue operations in a timely manner. However, if you are unable to reach LMSC at the numbers provided to you, we have made alternative arrangements for you to contact an LMSC representative at (585)775-9453. Nevertheless, should you ever need assistance regarding your investments, you may always contact the issuing companies and/or our clearing firm directly. Their numbers can be found on your statements and confirmations.

This notice is being provided on behalf of LMSC as well as on behalf of each of LMSC's offices of supervisory jurisdiction insofar as those offices obtain nonpublic personal information regarding any LMSC customer.

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