



PRIVACY POLICY

Affinity Investment Advisors, LLC (“Affinity”) appreciates the privacy concerns and expectations of our customers. We are committed to maintaining a high level of privacy and confidentiality when it comes to your personal information and we use that information only where permitted by law. We recognize that, as a customer, you not only entrust us with your money but with your personal information. Your trust is important to us and you can be sure we will continue our tradition of protecting your personal information.

We provide this privacy notice to you so that you may understand our policy with regard to the collection and disclosure of nonpublic personal information (“Information”) pertaining to you.

We collect nonpublic personal information about you from the following sources:

- Information we receive from you on applications or other forms; and
- Information about your transactions with us or others.

Protecting the security and confidentiality of your Information

We restrict access to Information about you to those employees who need to know that Information to provide products or services to you. We maintain physical, electronic, and procedural safeguards to ensure the confidentiality of your Information.

We do not sell your Information to anyone. We may share nonpublic personal information when processing transactions or managing accounts on your behalf. We do not disclose, nor do we intend to disclose, nonpublic personal information about our current or former clients to anyone except as permitted by law.

We may revise our privacy policy in the future. If you would like a current copy of our privacy policy, you may view it on our website at www.affinityinvestment.com or by calling (949) 660-6373.

Client Copy – Please retain for your records