

Heximer Investment Management, Inc.
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PRIVACY NOTICE POLICY

Heximer Investment Management, Inc. (“the Company” or “HIM”) protects its clients’ personal non-public information (“NPI”). Pursuant to the Investment Advisers Act, Investment Advisers are required to adopt policies and procedures regarding data protection and cybersecurity. These policies and procedures are to prevent disclosure of material, nonpublic information and to protect the confidentiality of client information. Federal law gives consumers the right to limit some, but not all sharing of personal information. Investment Advisers are also required to inform its clients how it collects, shares, and protects their personal information. Please read this privacy notice policy established by HIM carefully to understand what we do.

Our Commitment to Your Privacy

Protecting our clients’ privacy is of the utmost importance to the Company. It is HIM’s policy that no private client financial information obtained by the Company is sold or made available to third parties except that:

- Third parties may be used by Advisor to assist in the management or maintenance of client accounts (such as client’s custodian);
- Client information may be released to client’s accountant, legal counsel and/or other third-party representatives at client’s direction;
- Client information may be released in accordance with applicable laws and regulations.

The Company will not share nonpublic personal information about our clients with nonaffiliated third parties without prior client consent, except for specific purposes described below. This notice explains our collection, use and safeguarding of client information.

How Heximer Investment Management, Inc. Gathers Information

In connection with providing clients with investment management services and/or financial planning services, the Company may obtain information about clients from the following sources:

- Client agreements and other information that clients provide to the Company, whether in writing, in person, by telephone, electronically or by any other means. This information may include a client’s name, address, phone number, email address, social security number, employment information, income, investment experience, and credit references;

- Personal tax returns provided by the client;
- Transactions on a client's behalf. This information may include the client's account balances, positions, investment interests and history; and
- Public sources

Sharing Information with Nonaffiliated Third Parties

The Company only discloses non-public client information to nonaffiliated third parties without prior client consent when the Company believes it necessary to conduct the Company's business or as required or permitted by law, such as:

- If the client requests or authorizes the disclosure of the information;
- To provide client account services or account maintenance;
- To respond to a subpoena or court order, judicial process, law enforcement or regulatory authorities;
- To perform services for the Company or on its behalf to develop or maintain proprietary trading or other software;
- In connection with a proposed or actual sale, merger, or transfer of all or a portion of the Company's business or an operating unit;
- To help us prevent fraud;
- With rating agencies, persons assessing compliance with industry standards, or to the attorneys, accountants and auditors of the firm, and
- To comply with federal, state, or local laws, rules and/or other applicable legal requirements.

The Company does not make any disclosure of client nonpublic personal information to other companies who may want to sell their products or services to clients. For example, we do not sell client lists, and we will not sell client names to catalogue companies.

Opt Out Provision

If, at any time in the future, it is necessary to disclose any client personal information in a way that is inconsistent with this policy, the Company will give its clients advance notice of the proposed disclosure so that clients will have the opportunity to either opt-in or opt-out of such disclosure, as required by applicable law.

Clients are advised that the Company believes that sharing client private information under the circumstances noted above is either mandated by law or necessary for the Company to conduct its business and to best serve client accounts. Clients desiring to opt out of any third-party disclosures should contact the Company immediately. Opting out may necessitate that the Company terminate its management agreement with the client and arrange for the client to transfer their account(s).

Former Clients

Our Privacy Notice Policy continues to apply to all former clients.

To Whom This Policy Applies

This Privacy Notice Policy applies to individuals who obtain or have obtained services from Heximer Investment Management, Inc. used primarily for personal, family or household purposes.

Our Security Practices and Information Accuracy

The Company takes steps to safeguard client information. The Company restricts access to clients' personal and account information to our employees and advisors for business purposes only. The Company maintains physical, electronic and procedural safeguards to protect client's personal information.

Additionally, the Company has internal controls to keep client information as accurate and complete as possible. If the client believes at any time any their information is not accurate, please contact the Company immediately.

Other Information

The Company reserves the right to change this Privacy Notice Policy. The examples provided within this Privacy Notice Policy are illustrations, and they are not intended to be exclusive. If you have any questions about the Company's Privacy Notice Policy, please contact John Oshner, Co-Chief Compliance Officer, at Tele: (614) 760-9100 / Fax: (614) 547-6574.