



Privacy Policy

BeManaged values the privacy of its clients and maintains a strict policy regarding the use and safeguarding of personal, non-public information.

BeManaged obtains only that information from clients that will assist in providing quality investment management and information necessary to comply with state and federal compliance requirements. Such information may include, but is not limited to, a client's: (1) name; (2) mailing address; (3) email address; (4) credit card and other billing data; (5) investment data; (6) plan investment options; and (7) other personal information necessary to provide services to the client.

BeManaged uses the information collected primarily to manage client investments. We may disclose the personal information as necessary to service client accounts. Servicing activities may include, but are not limited to, the following: Administrative, customer assistance, clearing, operational, or other services; preparation, printing and delivery of portfolio management performance reports, confirmation statements and other documents; and maintenance and development of software and website data for BeManaged.

BeManaged will not disclose clients' personal information to companies or organizations not affiliated with us who would use the information to contact clients about their own products or services. Under no circumstances will BeManaged sell any of the personal information collected. BeManaged allows access only to individuals who must have client's personal information to service the account or to provide business, compliance, and other support services to BeManaged. For these reasons, the BeManaged privacy policy does not address an opt-out process.

BeManaged maintains physical, electronic and procedural safeguards to protect former and current clients' information from misuse or misappropriation.