

CapitalAlphabet, LLC

Investment Advisor Privacy Policy

CapitalAlphabet LLC is committed to protecting the privacy of our client's non-public personal information. This commitment is reflected in our privacy policy, which applies to both current and former clients.

Information We Collect

To provide our investment services effectively, we collect some non-public information (NPI) about our clients. This information may include your name, address, telephone number, social security number, date of birth, email address, employment details, income, and other relevant data. We collect and maintain this information to ensure we can serve you to the best of our ability. Even after you are no longer a client, we may continue to share your information as outlined in this notice.

Disclosure of Information

As part of our management services, we may disclose your non-public personal information to third parties as permitted by law. These third parties may include broker-dealers, custodians, administrators, transfer agents, accountants, or attorneys whose services are necessary to fulfill our obligations to you. We will not disclose your information under any other circumstances unless required by law.

How We Protect Non-Public Personal Information

We have implemented security procedures designed to protect the confidentiality of your information. These measures include password-protected access to our computer files and additional safeguards.

Opting Out

Federal law gives you the right to limit how your non-public personal information (NPI) is shared. You can 'opt-out' of sharing with affiliates for their everyday business purposes (like creditworthiness assessments), sharing with affiliates for marketing, and sharing with non-affiliates for marketing. State laws and individual companies may provide even more control over your information. To opt-out of any of these options, please contact us immediately by email or phone.