

PRIVACY POLICY

Fennimore Advisory, LLC, doing business as Benchmark Financial, requires that you provide current and accurate financial and personal information. Benchmark Financial will protect the information you have provided in a manner that is safe, secure and professional. Benchmark Financial is committed to protecting your privacy and to safeguarding that information.

If you have any questions after reading this Privacy Policy, please contact Benchmark Financial by phone at 610-715-9554, email at josh@benchmarkfn.com or by writing to 1150 First Avenue, Suite 501, King of Prussia, PA 19406. Benchmark Financial considers the privacy of its clients to be of fundamental importance and has established a policy to maintain the confidentiality of the information you share with the firm.

Information Benchmark Financial collects

The personal information Benchmark collects directly from you includes information required to communicate with you and help Benchmark Financial in addressing your financial needs. This information could include:

- Your name and address
- Investment objectives and experience
- Financial circumstances
- Account balance and account transactions
- Social security number
- Employment information

Benchmark Financial collects your personal information, for example, from the following sources:

- Information Benchmark Financial receives from you on applications and other forms
- Information about your transactions with Benchmark Financial or others

Benchmark Financial also collects your personal information from others such as custodians, and other companies.

How information is used

All financial companies need to share client personal information to run their everyday business. Benchmark Financial uses information about you to provide services to you. Benchmark Financial may disclose the information to third parties as permitted by law, including the custodians or other companies used to provide services to you. From time to time, Benchmark Financial may be required to give information about its business to regulatory authorities or as required by law. This may include personal information about you. Benchmark Financial does not sell your personal information to anyone.

How information is safeguarded

Benchmark Financial has procedures in place that Benchmark Financial believes are reasonably designed to protect the security and confidentiality of your information. These include password-protected user access to Benchmark Financial's computer files, training of employees, and strict confidentiality policies that apply to all employees.

Benchmark Financial reserves the right to change this policy at any time as needed and you will be notified if any changes occur.

If you would like a copy of Benchmark Financial's current Firm Brochure (Form ADV Part 2A 2B) please call, write or email and you will be provided with a copy at no charge.