

Privacy Policy

Jamison Hanson Advisors (“JH Advisors”) is committed to client confidentiality and the protection of your privacy. The following information is provided, as required by law, to help you understand our privacy policy and how we will handle and maintain confidential personal information as we fulfill our obligations to protect your privacy. "Personal information" refers to the nonpublic financial information obtained by JH Advisors in connection with carrying out our services.

Information We Collect

JH Advisors collects personal information as part of our relationship with you, to provide client services and fulfill legal and regulatory requirements. The type of information JH Advisors collects may include:

- Information JH Advisors receives from you on forms (such as name, address, Social Security number, profile documents, assets and income);
- Information you provide JH Advisors directly about your personal finances or personal circumstances or which JH Advisors may receive from brokerage statements or other information you authorize JH Advisors to receive.

Information Disclosed In Administering Products and Services

JH Advisors will not disclose personal information about current or former clients to non-affiliated third parties except as permitted or required by law. JH Advisors does not sell any personal information about you to any third party. JH Advisors will not disclose personal information without your authorization, except as required or permitted by law.

Your Choice to Limit Marketing By Our Affiliate(s)

You may limit our affiliates from marketing their products or services to you based on information that we share with them, such as your income and your account history. Your decision to limit marketing offers from our affiliates will apply for 5 years. Once that period expires, you will be allowed to extend your decision. This limitation does not apply in certain circumstances, such as if you currently do business with one of our affiliates or if you ask to receive information or offers from them.

Procedures to Protect Confidentiality and Security of Your Personal Information

JH Advisors has procedures in place that limit access to personal information to those employees who need to know such information in order to perform business services. In addition, JH Advisors maintains physical, electronic and procedural safeguards to guard your nonpublic personal information. JH Advisors will update its policy and procedures when necessary to ensure that your privacy is maintained and that JH Advisors conducts business in a way that fulfills our commitment to you. If JH Advisors makes any material changes in its privacy policy, we will make that information available to clients through our Web site and/or other communications.

SMS Messaging and 10DLC Compliance

Jamison Hanson LLC may send SMS messages to clients who have opted in to receive communications. In compliance with 10DLC (10-digit long code) regulations, we adhere to the following practices:

Consent Based Messaging: We only send SMS messages to individuals who have explicitly opted in to receive such communications.

No Sale or Sharing of SMS Consent Data: Text messaging opt-in data and consent will not be sold or shared with third parties or affiliates for marketing or promotional purposes.

Opt-Out Instructions: You may opt out of receiving SMS messages at any time by replying “STOP” or “UNSUBSCRIBE” to any message you receive from us. You will not receive further messages unless you opt back in.

Message Frequency & Charges: Message frequency may vary. Message and data rates may apply depending on your mobile carrier.

- **Thank You**

At JH Advisors, your business is important to us and we do our best to safeguard your financial assets and personal information about you. If at any time you have questions about our Privacy Policy or ADV, please contact our Chief Compliance Officer, Steven Jamison, at (503) 391-1040 or write to us at 1564 Commercial Street SE, Salem, Oregon 97302.