

Notice of Privacy Policies

YOUR PRIVACY IS IMPORTANT

As a client of Ehlers Investment Partners, LLC**, a registered investment adviser, your privacy is important to us. This Notice discusses the information we collect about you, how we treat it, with whom we share it, and how we protect it.

INFORMATION WE COLLECT

In the normal course of business, we collect information about you from a variety of sources, including:

- information from you, such as information we receive on account applications or other forms (such as your name, address, tax id number, and financial information); and
- information about you, your accounts, your securities holdings and transactions which we receive from you or others, such as account custodians, brokers, and other financial services firms.

HOW WE MANAGE & PROTECT YOUR INFORMATION

We do not sell information about current or former clients to third parties. We may disclose your information as necessary to:

- effect, administer, or enforce a transaction that you request or authorize;
- process or service a financial product or service that you request or authorize; or
- maintain or service your account with us or with another entity.

We may also disclose your information for everyday business purposes to: organizations or firms who provide consulting, technology or other services for us and agree to maintain its confidentiality; others, such as attorneys or others who are authorized to represent you; regulatory agencies; or, as we are otherwise permitted or required by law or process of law, but only to the extent we may do so without providing you with the option to “opt-out” of such disclosure. We may also disclose your personal information to a potential buyer and its legal, accounting and other professionals in connection with a proposed or actual sale, merger, transfer or exchange of all or a portion of our business, subject to a contractual obligation to maintain strict confidentiality by the buyer and such professionals.

We restrict access to your information to our employees and to permitted third-parties who need to know that information to provide products or services for us, or to provide, process, or maintain any security, account, or investment product, service or program for you or your benefit. To protect your information from unauthorized access or use, we have adopted administrative, technical, and physical security procedures that comply with federal law. These measures include computer safeguards and secured files and buildings.

CLIENT NOTIFICATIONS

Under certain circumstances, if we materially change these policies, we are required by law to provide an annual notice describing our privacy policies. Our privacy policies, as amended from time to time, apply to current and former clients; however, former clients will not receive a copy of our notice of privacy policies. We reserve the right to amend our privacy policies at any time, without prior notice, subject to compliance with applicable regulatory requirements.

Please do not hesitate to contact us with questions about this notice at (800) 552-1171, Ehlers Investment Partners, LLC, N19W24400 Riverwood Drive, Suite 100, Waukesha, Wisconsin, 53188.

**EIP is a subsidiary of The Ehlers Companies, which also include:

Ehlers and Associates, Inc., a registered municipal advisor
Bond Trust Services Corporation, a chartered bank