

FACTS

WHAT DOES LIFESTYLE ASSET MANAGEMENT, INC. ("LSAM") DO WITH YOUR PERSONAL INFORMATION?

Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> • Social Security number, physical and mailing addresses, phone numbers, and email addresses • Net worth, income, country of citizenship, and employment status • Account balances and transaction history
How?	All financial companies need to share clients' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their client's personal information; the reasons LSAM chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does LSAM share?	Can you limit this sharing?
For our everyday business purposes – Such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes – To offer products and services to you	Yes	No
For joint marketing purposes with other financial companies	No	We don't share
For our affiliates' everyday business purposes – Information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes – Information about your creditworthiness	No	We don't share
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	No	We don't share

To limit our sharing	<ul style="list-style-type: none"> • Call (281) 612-2035 • Visit us online at www.lsaminc.com or • Mail the form below <p>Please note: If you are a <i>new</i> client, we may begin sharing your information 30 days from the date we deliver this notice to you. When you are <i>no longer</i> our client, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.</p>
Questions?	Call (281) 612-2035 or go to www.lsaminc.com.net

Who we are	
Who is providing this notice?	LifeStyle Asset Management, Inc.

What we do	
How does LSAM protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does LSAM collect my personal information?	We collect personal information, for example, when you <ul style="list-style-type: none"> • open an account or deposit money • provide us with your income and net worth information
Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> • sharing for affiliates' everyday business purposes – information about your creditworthiness • affiliates from using your information to market to you • sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account – unless you tell us otherwise.

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.



Mail-in Form	
Mark any/all you want to limit: <input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me.	
Name	Mail to: LifeStyle Asset Management, Inc. ATTN: Chief Compliance Officer 211 West Edgewood, Suite 300 Friendswood, TX 77546
Address	
City, State Zip	
Account No.	