

**Montgomery Investment Management, Inc.  
Privacy Policy**

***Montgomery Investment Management, Inc. requires personal information regarding all clients be gathered at the time accounts are initially opened, and updated periodically thereafter, as long as the account is managed by our firm.***

***All information is used for the specific business purpose of administering the account as set by our client's stated objectives. All nonpublic information gathered and maintained must comply with state, federal, and industry regulations. We do not disclose any nonpublic information about our clients or former clients outside of a limited number of service providers, or third party relationships necessary to enhance the best possible service and performance of client accounts. Additionally, our firm will respond to government subpoenas and consumer reporting agencies.***

***Guarding your privacy is our obligation. We restrict access to customer information solely to those employees that have a business reason to have such access. We also maintain physical and electronic procedural safeguards to all private client information in addition to screening and restricting service providers to specific business use of such information.***

***Feel free to call us at any time regarding questions about this policy (301-897-9700).***