



SECURE INVESTMENT
MANAGEMENT

Privacy Disclosure Document

Secure Investment Management, LLC
3067 W. Ina Road, Suite 125
Tucson, AZ 85741

Our Primary client goal at Secure Investment Management, LLC, is to protect your privacy.

To conduct regular business, we may collect non-public personal information from sources such as:

- Information reported by you on applications or other forms you provide to us, such as your name, address, social security number, assets, etc.
- Information about your transactions with us, our affiliates, or others

As the Firm shares non-public information solely to service our client accounts, we do not disclose any non-public personal information about our clients or former clients to anyone, except as permitted by law.

For example, the firm may share client personal information if it is necessary for processing or administering a financial transaction requested or authorized by a client.

Information Safeguarding:

Secure Investment Management, LLC, will internally safeguard your non-public personal information by restricting access to only those employees who provide products or services to you or those who need access to your information to service your account. In addition, we will maintain physical, electronic, and procedural safeguards that meet federal and/or state standards to guard your non-public personal information.