

FACTS

PRIVACY NOTICE

HOW DOES INDEX FUNDS ADVISORS, INC. (“IFA”)

MANAGE YOUR PERSONAL INFORMATION?

Why?

Financial companies determine how to share consumer personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires financial companies to tell consumers how personal information is collected, shared, and protected. Please carefully read this Privacy Notice.

What?

The type of personal information we collect and share depends on the products and services provided to you. This information may include, but is not limited to:

- Social Security Number
- Birth Date
- Income
- Account Balance
- Transaction History

When you are *no longer* our customer, we continue to share your information as described in this notice.

How?

All financial companies must share clients’ personal information in order to expedite clients’ financial objectives. In the section below, we list the reasons financial companies may share their clients’ personal information; the circumstances under which IFA shares your information; and whether you may direct IFA to limit this sharing.

Circumstances which require personal information	Does IFA share?	Can you limit this sharing?
For IFA’s 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 IFA’s marketing purposes— to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	<i>Not Applicable - IFA Does Not Jointly Market</i>
For our affiliates’ everyday business purposes— information about your transactions and experiences	No	<i>Not Applicable – IFA Does Not Have Affiliates</i>
For our affiliates’ everyday business purposes— information about your creditworthiness	No	<i>Not Applicable – IFA Does Not Have Affiliates</i>
For non-affiliates to market to you	No	<i>Not Applicable – IFA Does Not Share With Non-Affiliates</i>

Questions?

Contact Index Funds Advisors, Inc. by mail:

19200 Von Karman Avenue
Suite 150
Irvine, CA 92612

by phone:
888-643-3133

Website: www.IFA.com

Additional information	
How does Index Funds Advisors, Inc. protect my personal information?	To protect your personal information from unauthorized access and use, IFA uses security measures in compliance with federal law. These measures include technology safeguards and secured files and buildings.
How does Index Funds Advisors, Inc. collect my personal information?	We collect your personal information, for example, when you: <ul style="list-style-type: none"> ■ Open an Account or Seek Financial Advice ■ Make a Wire Transfer or Pay by Check
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 non-affiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing.</p>
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.
Non-affiliates	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.