



GREEN INVESTMENT MANAGEMENT, INC.
ACTIVE-DEFENSIVE INVESTING

2025 Privacy Policy

Federal laws have established privacy standards for the financial services industry. The requirements are consistent with privacy policies and practices that Green Investment Management, Inc. has had in place for some time and will continue to practice in the future. The laws require us to take some specific steps to notify individual customers about our privacy practices and to avoid improper disclosure of personal information. Pursuant to these requirements, the following is our policy regarding personal information that applies to all customers – former and current.

- Green Investment Management, Inc. collects information that helps serve our Clients' financial needs and fulfill legal and regulatory requirements. We collect nonpublic personal information about Client from information provided on applications and related account forms and legal documents related to account establishment. This information may include demographic data as well as financial information (individual risk tolerance, objectives for the investments, and financial situation). Still other information may be obtained through the client's relationship with us in their accounts (balances, transactions, types of accounts maintained, etc.). This information may be collected in a variety of ways - in writing through the mail, during telephone or Internet transactions, in electronic downloads or in personal interviews with your Registered Representative or advisor.
- Green Investment Management, Inc. does not sell lists of our customers or former customers to anyone, nor do we disclose customer information listed above to marketing companies. We will only share information we collect with nonaffiliated third parties as provided by law. For example, federal regulations permit us to share some, or all the information collected (see next paragraph) about clients with service providers such as our trust companies, our insurance company vendors, direct mutual fund/annuity firms, our internet service provider, and our auditing firm.
- Green Investment Management, Inc. has implemented security standards and processes - including physical, electronic, and procedural safeguards - to ensure that access to customer information is limited to employees, registered representatives, or agents such as accountants or attorneys who may need it to do their jobs. They are required to respect the confidentiality of all customer information. We uphold these privacy principles throughout our company and with our business partners. Third party companies with which we share customer information are required to maintain the confidentiality of that information, as well.

If any changes are made to this policy, you will be notified as required by law and you can always view our current policy online at gimlink.com.