INTEGRITY
INVESTMENT ADVISORS
Invest with integrity.

Privacy Notice

September 2026

At Integrity Investment Advisors, LLC, we are committed to protecting the confidentiality, integrity, and security of the personal information entrusted to us. This Privacy Notice describes the types of information we collect, how we use and disclose that information, and the measures we take to protect it.

Information We Collect

In the course of providing investment advisory and financial planning services, we may collect nonpublic personal information about you from a variety of sources, including:

- Information you provide to us on applications, agreements, questionnaires, financial planning documents, correspondence, or during meetings and other communications with us, such as your name, address, telephone number, email address, Social Security or taxpayer identification number, date of birth, marital and family information, employment information, income, assets, liabilities, investment objectives, risk tolerance, financial goals, estate planning information, tax information, and, when relevant to the services we provide, health-related information.
- Information regarding your accounts and transactions, including account balances, holdings, purchases, sales, contributions, distributions, cost basis information, and other transaction history.
- Information we receive from custodians, broker-dealers, financial institutions, investment managers, insurance providers, and other third parties involved in providing services to you.
- Information we receive from our affiliated company, 365 Tax Strategy, LLC, when you are a client of both Integrity and 365 and such information sharing is permitted by law and appropriate to coordinate the services you have engaged the firms to provide.
- Other information necessary to provide advisory, financial planning, administrative, compliance, security, or related services.

How We Use Your Information

We use your personal information as reasonably necessary to provide and administer the services you have requested from us. This may include developing and updating your financial plan; managing and monitoring your investments; opening, maintaining, and servicing accounts; executing or facilitating transactions; preparing portfolio and financial reports; coordinating tax, estate planning, insurance, and other financial planning matters; communicating and coordinating with your other professional advisors at your request or as appropriate to provide our services; maintaining our books and records and satisfying legal and regulatory requirements; preventing fraud, protecting information systems, and maintaining the security of client information; and conducting our ordinary business and administrative activities. We limit our collection, use, and disclosure of personal information to information that is reasonably necessary for legitimate business, client service, legal, regulatory, or security purposes.

Sharing Information With 365 Tax Strategy, LLC

Integrity is affiliated with 365 Tax Strategy, LLC ("365"), a tax preparation and tax advisory firm. Certain Integrity personnel also have roles with 365, and some clients engage both Integrity and 365. When you are a client of both firms, Integrity may share nonpublic personal information with 365, and may receive information from 365, to the extent permitted by applicable law and reasonably necessary to coordinate the investment advisory, financial planning, tax planning, or tax preparation services you have engaged the respective firms to provide. Depending upon the services involved, information shared may include identifying and contact information, financial information, account balances and holdings, securities transactions, realized gains and losses, income and cash-flow information, tax-related information, financial planning information, and other information relevant to the coordinated services.

Information received from or provided to 365 will be used only for legitimate client service or business purposes and will remain subject to applicable confidentiality, privacy, and information-security requirements. Integrity does not share information with 365 for unrelated marketing purposes based upon consumer-report or other eligibility information except as permitted by applicable law or as authorized or requested by you.

Information We Share With Nonaffiliated Third Parties

We may disclose nonpublic personal information to nonaffiliated third parties as necessary to provide services to you, conduct our business, or comply with applicable law. These parties may include custodians and broker-dealers; investment managers and sub-advisers; financial institutions; insurance and investment-platform providers; portfolio accounting, performance reporting, data aggregation, financial planning, and other technology providers; information technology, cybersecurity, cloud, communications, document-management, and other service providers; attorneys, accountants, auditors, compliance consultants, and other professional service providers; your attorneys, accountants, tax professionals, insurance professionals, or other advisors when you direct or authorize us to coordinate with them; and government agencies, securities regulators, law enforcement authorities, courts, or other parties when disclosure is permitted or required by law.

We may also disclose information when necessary to process or service a transaction you request or authorize, protect against fraud or unauthorized transactions, respond to legal process, protect our rights or property, or otherwise comply with applicable law.

Where appropriate, we require service providers that receive access to client information to protect the confidentiality and security of that information and to use it only for the purposes for which it was disclosed.

Your Right to Limit Sharing

Integrity does not sell your nonpublic personal information. We also do not disclose your nonpublic personal information to nonaffiliated third parties so that those parties may independently market their products or services to you.

Because our disclosures to nonaffiliated third parties are limited to disclosures permitted by law, including disclosures necessary to provide services to you and conduct our ordinary business activities, federal law generally does not provide an opt-out right with respect to those disclosures. If our information-sharing practices change in a manner that gives you a legal right to limit a disclosure, we will provide any notice and opportunity to exercise that right required by applicable law before implementing the new practice.

Protecting Your Information

Integrity maintains administrative, technical, and physical safeguards reasonably designed to protect the security and confidentiality of customer information, protect against anticipated threats or hazards to the security or integrity of that information, and protect against unauthorized access to or use of customer information. Access to nonpublic personal information is limited to personnel and service providers who have a legitimate business need for the information. We maintain policies and procedures addressing information security, access controls, cybersecurity, employee responsibilities, service-provider oversight, incident response, and secure disposal of confidential information.

We regularly evaluate our safeguards and update them as appropriate in light of changes in technology, business practices, threats, and applicable legal and regulatory requirements.

Information Security Incidents

Integrity maintains written procedures designed to detect, respond to, and recover from unauthorized access to or use of customer information. If we become aware of an incident involving unauthorized access to or use of customer information, we will investigate the nature and scope of the incident, take appropriate steps to contain and control it, and provide notice to affected individuals when required by applicable federal or state law.

Retention and Disposal of Information

We retain client information for the periods required by applicable securities laws and regulations and for such additional periods as reasonably necessary for legitimate business, legal, regulatory, or operational purposes. When information is no longer required to be retained, we take reasonable measures to dispose of it in a manner designed to protect against unauthorized access to or use of the information.

Former Clients

We protect information concerning former clients in the same manner as information concerning current clients. We do not disclose nonpublic personal information about former clients except as described in this Privacy Notice or as otherwise permitted or required by law.

Changes to Our Privacy Practices

We may revise this Privacy Notice from time to time to reflect changes in our business practices, information-sharing arrangements, technology, or applicable law. When required by law, we will provide you with a revised Privacy Notice before implementing a material change in our privacy practices. Our current Privacy Notice is also available upon request.

Questions

If you have questions regarding this Privacy Notice or Integrity's privacy practices, please contact us.