



# ASPIRIANT

Rev. 1/2014

## FACTS

### WHAT DOES ASPIRIANT, LLC DO WITH YOUR PERSONAL INFORMATION?

<b>Why?</b>	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share and protect your personal information. Please read this notice carefully to understand what we do.
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<b>What?</b>	<p>The types of personal information we collect and share depends on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> <li>• Social Security Number and Assets</li> <li>• Account Transactions and Account Balances</li> <li>• Retirement Assets and Wire Transfer Instructions</li> </ul>
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<b>How?</b>	All financial companies need to share clients' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients' personal information; the reasons Aspiriant, LLC chooses to share; and whether you can limit this sharing.
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Reasons we can share your personal information	Does Aspiriant, LLC share?	Can you limit this sharing?
<b>For our everyday business purposes –</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
<b>For marketing purposes –</b> to offer our products and services to you	Yes	Yes
<b>For joint marketing with other financial companies</b>	No	Do Not Share
<b>For our affiliates' everyday business purposes –</b> information about your transactions and experiences	Yes	No
<b>For our affiliates' everyday business purposes –</b> information about your creditworthiness	No	Do Not Share
<b>For our affiliates to market to you</b>	No	Do Not Share
<b>For nonaffiliates to market to you</b>	No	Do Not Share

<b>To limit our sharing</b>	<ul style="list-style-type: none"> <li>• Call 415.371.7800</li> <li>• Email us at <a href="mailto:compliance@aspiriant.com">compliance@aspiriant.com</a></li> </ul> <p><b>Please note:</b> If you are a new client, we can begin sharing your information 10 days from the date we sent this notice. When you are no longer our client, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.</p>
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<b>Questions?</b>	Call 415.371.7800 or email <a href="mailto:compliance@aspiriant.com">compliance@aspiriant.com</a>
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<b>Who we are</b>	
<b>Who is providing this notice?</b>	Aspiriant, LLC
<b>What we do</b>	
<b>How does Aspiriant, LLC protect my personal information?</b>	<p>To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and offices.</p> <p>With respect to online privacy, we employ certain internet and email specific practices to maintain the security of your online sessions, including but not limited to firewall barriers, encryption and authentication procedures.</p>
<b>How does Aspiriant, LLC collect my personal information?</b>	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> <li>• Seek financial or tax advice or seek advice about your investments</li> <li>• Make a wire transfer or direct us to buy or sell your securities</li> <li>• Enter into an investment advisory contract</li> </ul> <p>We also collect your personal information from others such as credit bureaus, affiliates or other companies.</p>
<b>Why can't I limit all sharing?</b>	<p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> <li>• Sharing for affiliates' everyday business purposes – information about your creditworthiness</li> <li>• Affiliates from using your information to market to you</li> <li>• Sharing for nonaffiliates to market to you</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing.</p>
<b>What happens when I limit sharing for an account I hold jointly with someone else?</b>	Your choices will apply to everyone on your account – unless you tell us otherwise.

<b>Definitions</b>	
<b>Affiliates</b>	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> <li>• Our affiliates include companies with an Aspiriant name; Primiani &amp; Stevens, PC; Advanced Capital Intelligence, LLC and its related funds. We also consider the Aspiriant Risk Managed Global Equity fund to be an affiliate for this purpose although it is not under common control.</li> </ul>
<b>Nonaffiliates</b>	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> <li>• Non affiliates we share with can include: attorneys, accountants, custodians, brokers, service providers, banks and other financial advisors and institutions.</li> </ul>
<b>Joint marketing</b>	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> <li>• Aspiriant, LLC doesn't jointly market.</li> </ul>