

Who we are	
Who is providing this notice?	CPS INVESTMENT ADVISORS ("CPS")

What we do	
How does CPS protect my personal information?	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 buildings. We restrict access to your non-public personal information to those employees who need to know that information to service your account.
How does CPS collect my personal information?	We collect your personal information, for example, when; <ul style="list-style-type: none"> * You sign our agreement or open a brokerage /custodial account. * Communicate with us or purchase or sell securities. * Deposit or withdraw funds, provide or update your investment portfolio.
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 nonaffiliates to market to you. <p>State laws and individual companies may give you additional rights to limit sharing.</p>
What happens when I limit sharing for an account I hold jointly with someone else?	Your Choices will apply to everyone on your account.

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> * CPS Group CPA's, PA, a related accounting firm. CPAlliance Insurance Services, a related insurance agency. We will only share your information with these affiliates.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <p>We will not share your information with any nonaffiliates unless such sharing is necessary to service your account or required by law.</p>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> * We have not entered any joint marketing agreements.

Other important information	