

PRIVACY POLICY

Facts	What Does CCM Investment Management Do With Your Personal Information?
Why?	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.
What?	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> Social Security Number Assets Income Account Balances Risk Tolerance Investment Experience <p>When you are no longer our customer, we continue to share your information as described in this notice.</p>
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information, the reasons CCM Investment Management, LLC (hereinafter referred to as "CCMIM") chooses to share, and whether you can limit this sharing.

Reasons we can share your personal information	Does CCMIM Share?	Can you limit this sharing?
For our 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 our marketing purposes —to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	We don't share
For our affiliates' everyday business purposes —information about your transactions and experiences	No	We don't share
For our affiliates' everyday business purposes —information about your creditworthiness	No	We don't share
For our affiliates to market to you.	No	We don't share
For nonaffiliates to market to you	No	We don't share

QUESTIONS?	Call 774-226-8765 or email contact@ccm.investments
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Who we are	
Who is providing this notice?	CCM Investment Management, LLC (CCMIM)
What we do	
How does CCMIM 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.
How does CCMIM collect my personal information?	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> • Open an account • Seek advice about your investments • Enter into an Investment Advisory Contract • Tell us about your investments • Show us your government issued ID • Apply for insurance <p>We also collect your personal information from other companies.</p>
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> • sharing for affiliates' everyday business purposes — information about your creditworthiness • affiliates from using certain 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>
Definitions	
Affiliates	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> • CCMIM has no affiliates
Nonaffiliates	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> • CCMIM does not share with nonaffiliates so they can market to you
Joint Marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> • CCMIM doesn't jointly market
Other important information	
<p>State law gives you additional rights to limit sharing. Under certain states' laws, we may not share NPI about you with non-affiliates unless you first give us written permission ("opting-in"). If you do not give us permission to share your information, then we are prohibited from sharing this information with non-affiliates as defined above.</p> <p><i>I give CCMIM permission to share my NPI with non-affiliates for its marketing and everyday business purposes.</i></p> <p>Signature of Client(s): _____ Date: _____</p>	