

## **OKLO financial, LLC Privacy Policy**

At OKLO financial, LLC (OKLO) we are committed to building relationships with our current and prospective clients based on trust and confidence. An important part of our relationship includes maintaining the confidentiality of our client's nonpublic personal information. Below is our policy regarding the collection and protection of your personal information.

Most importantly, we do not sell any of our client's personal information to anyone. We collect only the information that is necessary to administer your account(s) with us. This information is collected and retained to help serve your financial needs, to provide excellent customer service, and to fulfill legal and regulatory requirements.

The information that we collect can be summarized as follows: Identifying information furnished by you on account establishment forms creating your account with OKLO and the Custodian. Examples include your name, address, age, Social Security number and beneficiary designations.

Account transaction information obtained from you and the various entities that comprise the assets in your account(s). This includes balances, positions and history that have occurred within your account(s), along with correspondence and phone contacts with us concerning your account and the assets held within your account, and our services.

Identifying information and account transaction information may be disclosed to financial service providers, who are nonaffiliated parties. Examples are Brokers/Dealers, Registered Investment Advisors, or Investment Advisory Representatives. These companies and individuals are also required to maintain the confidentiality of this information.

Other than the above exceptions, we do not disclose any nonpublic personal information regarding our current or former clients unless authorized by the client or as permitted by law.

We have implemented security standards and processes which include physical, electronic and procedural safeguards. These are designed to limit access to our client's information to only those employees and agents who may need it to adequately perform their job and provide services to the client. These employees and/or agents are required to respect the confidentiality of this information.