

Privacy Policy

World Investment Advisors, LLC (“WIA”) recognizes that its Clients have an expectation that WIA and its affiliates will maintain the confidentiality of Clients’ nonpublic personal information. Consequently, WIA has adopted this Privacy Policy concerning information obtained during the servicing of Client’s account(s).

Nonpublic Information: Nonpublic information obtained by WIA for purposes of providing services hereunder will not be furnished to third parties for any other purpose other than in furtherance of the services to be provided hereunder. Notwithstanding the foregoing, WIA may disclose nonpublic information (i) to the extent such disclosure is required by court order or by a valid order of a governmental body governmental or quasi-governmental agency (such as FINRA) (ii) after the time of disclosure such information becomes part of the public knowledge or literature, not as a result of any inaction or action of WIA, (iii) reasonably necessary for WIA to enforce its legal rights in any dispute with that Client; or (iv) is approved by Client, in writing, for release. WIA does not disclose nonpublic personal information about its Clients to any party except as permitted by law.

Sources of Personal Information: WIA collects Personal Information about its Clients from meetings with Clients and on applications or other forms Clients have submitted to WIA, as well as information about Clients’ investments or transactions with WIA or others (such as third-party service providers or fund companies) from other sources.

How WIA Protects the Confidentiality of Clients’ Nonpublic Personal Information: WIA does not sell or trade Clients’ information with nonaffiliated companies. When information is provided to third party service providers, safeguards are in place to assure that information is used only for the purpose it is provided. WIA maintains its records on secured computers. Prospective employees are screened for criminal convictions. Once hired, employees are made aware of WIA’s Privacy Policy and of the confidential nature of the information they handle. Employees are limited to accessing only that customer information that is necessary to perform their job functions.

To Whom This Policy Applies: This Notice applies to all WIA Clients who enter into an Advisory Services Agreement or Customer Agreement with WIA. For Former Clients: WIA’s Privacy Policy continues to apply even to Clients that have terminated services with the firm.

Internet Cookies: An internet “cookie” is a small amount of data that is placed on to your electronic device by a website and stored in your internet browser. Cookies allow websites to store things like preferences, so that it can recognize users when returning to the site and respond appropriately. When individuals access the worldadvisors.com website, WIA makes use of cookies to improve the load times and functionality of the website, and in some cases registration pages. WIA may from time to time also utilize data tracking software to assist in spotting trends and areas of improvement on the website. By accessing the worldadvisors.com site and embedded web pages, users are providing their express approval allowing WIA to utilize these technologies to improve services provided. WIA may also use various third-party cookies to report usage statistics of the service, or to authenticate users and prevent fraudulent access of user accounts.

Access to and Correction of Information: Upon the written request of Clients, WIA will make available for review any file that may be maintained for their personal Information; provided, however, that any Information collected in connection with, or in anticipation of, any claim or legal proceeding will not be made available. If Clients notify WIA that any Information is incorrect, the information will be reviewed. If WIA agrees the information is incorrect, records will be corrected. If WIA disagrees, Clients may submit a short statement of dispute, which will be included in any future disclosure of the disputed Information.

Additional California Privacy Disclosures: Please consult the supplemental *WIA Privacy Notice for California Residents* for additional disclosures pertinent to California residents.

Further Information: WIA reserves the right to change this Privacy Policy at any time. The examples contained within this Privacy Policy are illustrations and are not intended to be exclusive. This Policy attempts to comply with federal and state regulations regarding privacy. Clients may have additional rights under other foreign or domestic laws that may apply to them.

If the financial advisor servicing a client account leaves WIA to join another firm, the advisor is permitted to retain copies of client information so that he/she can assist with the transfer of the client account and continue to serve the client at their new firm.

“Opting Out” of Third-Party Disclosures: If a client does not want a financial advisor to retain copies of client sensitive information when he/she leaves WIA to join another firm, the client may contact the WIA Compliance Department by phone at (888) 201-5488 or by email at compliance@worldadvisors.com to request further information regarding this policy.

