

Avantia

Addendum B - Notice of Privacy Practices

Omdurman, LLC, *doing business as* Avantia (“Avantia,” “firm,” “we,” “us,” and “our”), an investment advisory firm, is committed to safeguarding the confidential information of its clients (“client,” “you,” and “your”). We do collect your non-public personal information in order to open and administer your accounts with us and to provide you with accurate and pertinent advice. We hold all non-public personal information you provide to us in the strictest confidence. If we were to change our policy, we would be prohibited under the law from doing so without advising you first.

We do not maintain any financial marketing partnerships or relationships of any kind and have no expectation of entering into any such relationships in the future. We will get your permission first before we share your personal information with most non-affiliated third parties. However, this does not apply to sharing information with non-affiliated third parties in connection with maintaining or servicing your account, or administering transactions requested or authorized by you. You may direct us not to make disclosures (other than disclosures required by law) regarding non-public personal information to any financial marketing partners, should we maintain any. To extent we should ever do so, we will first present you with an opportunity to opt-out of such information sharing. You also have the right to opt out of having your information shared with affiliates of Avantia. If you wish to opt-out of disclosures to third parties, please contact us at (425) 589-0904.

Avantia collects personal information about you from, among other sources, the following:

- applications, questionnaires or other forms;
- discussions with non-affiliated third parties;
- information about your transactions with us or others;
- tax returns and estate planning documents.

Avantia uses your personal information in the following manner:

- We do not sell your personal information to anyone.
- We limit employee access to information only to those who have a business or professional reason for knowing, and only to non-affiliated parties as permitted by law. (For example, federal regulations permit us to share a limited amount of information about you with a brokerage firm in order to execute securities transactions on your behalf, or so that our firm can discuss your financial situation with your accountant or lawyer.)
- We will provide you with notice of any changes in our information sharing practices. If at any time in the future it is necessary to disclose any of your personal information in a way that is inconsistent with this policy, we will give you advance notice of the proposed change so you will have the opportunity to opt out of such disclosure.
- We maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk.
- For non-affiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors, we also require strict confidentiality in our agreements with them and expect them to keep this information private.
- Federal and state regulators also may review firm records as permitted under law.
- We do not provide any of your information to mailing list vendors or solicitors for any purpose and will not do so without your permission.
- Personally identifiable information about you will be maintained during the time you are a client, and for the required time thereafter that such records are required to be maintained by federal and state securities laws. After this required period of record retention, all such information may be destroyed.

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards, secured files, and buildings. Federal law gives you the right to limit only:

- Sharing for affiliated companies’ everyday business purposes—information about your creditworthiness
- Affiliated companies from using your information to market to you.
- Sharing for non-affiliated companies to market to you

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Your rights under federal law include:

- **Right to Access Information/Correct Inaccurate Information.** You have the right to request access to information collected about you and information regarding the purposes for which we collect it and the third parties and service providers with which we share it. Additionally, you have the right to correct inaccurate or incomplete information. You may submit such a request as described below.
- **Right to Deletion of Information.** You have the right to request in certain circumstances that we delete any information that we have collected directly from you. You may submit such a request as described below. We may have a reason under the law why we do not have to comply with your request or why we may comply in a more limited way than you anticipated. If we do, we will explain that to you in our response.
- **Right to Opt Out of Sale of Information to Third Parties.** You have the right to opt out of any sale of your information by us to third parties by submitting a request. We do not, however, sell information to third parties for their own direct marketing purposes.
- **Right to Opt Out of Targeted Advertising.** You have the right to opt out of targeted advertising based on your information obtained from your activities over time and across websites or applications. We do not, however, utilize targeted advertising.
- **Right to Opt Out of Profiling.** You have the right to opt out of having your information processed for the purpose of profiling in the furtherance of decisions that produce legal or similarly significant effects concerning you. We do not, however, utilize profiling for these reasons.
- **Right to Appeal.** If we decline to take action in any request that you submit in connection with the rights described in the above sections, you may ask that we reconsider our response by sending an email to the same email box (referenced in section below) from which you receive the decision. You must ask us to reconsider our decision within 45 days after we send you our decision.

Trevor Cobb

Founder & CEO

Avantia: A Multi-Family Office

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