

2025 Privacy Policy

Policy Regarding the Safeguard of Client Information

SunSage Capital has always considered the privacy, confidentiality and security, of personal information received about prospective clients, clients ("Client"), former clients, and employees, obtained directly from you or from others in the performance of our business, to be of paramount importance. SunSage has been entrusted with your personal information, and SunSage acknowledges that trust as a vital cornerstone in our relationship with you.

Personal Information We Collect About You

The personal information SunSage collects may include, among other things, your Name, Gender, Social Security Number (SSN) or Taxpayer Identification Number (TIN), Date of Birth, Mailing Address, E-mail Address, Phone Number, Annual Income, Net Worth, Liquid Assets, Account Balances, Account Holdings, Investment Activity, and Account Information from other firms.

How We Use Your Personal Information

SunSage uses your personal information to determine the appropriateness of investments for your portfolio, setup your brokerage account with a custodian, interact with the custodian on your behalf when managing your investments, and to conduct other business related to the management of your accounts.

How We Disclosure of Your Personal Information

SunSage does not sell your personal information to anyone. SunSage does not share your personal information with nonaffiliated third parties except under the following conditions: (A) You have instructed us to share your information (B) You have requested a service that requires us to share your information (C) You have a chosen advisor, who may have referred you to us, that requests us to share your information (D) if we are compelled to do so by law or to prevent fraud, or (E) if we need to report suspected client abuse, neglect, or extortion.

How We Safeguard Your Personal Information

SunSage restrict access to information about you to those employees who need to know the information in order to perform their jobs, such as servicing your accounts, providing you with information you request, or notifying you of new products and services. To protect your personal information, we maintain physical, electronic, and procedural safeguards in keeping with industry standards and practices, and we review and adjust these safeguards regularly in response to advances in technology.

How We Handle Your Online Privacy

SunSage does not use cookies, web beacons, or other methods to secretly collect information. We do use our e-mail system and web site to deliver (and request) information directly to (and from) you. Industry standard e-mail security is utilized. SunSage web site information is secured & encrypted using SSL certificate technology.

How We Keep You Informed

We may revise this Privacy Policy from time to time. If we intend to use or disclose personal information for purposes materially different than those described in this policy, we will make reasonable efforts to notify you including by posting the revised Privacy Policy on our web site: <http://www.sunsage.com>

Your Help is Needed

For your protection, you should not provide your account information to anyone. If you become aware of any suspicious activity relating to your account, it is your responsibility to contact us immediately. If you have any questions relating to this privacy policy or concerns about the way in which we have handled information about you, please do not hesitate to send us an e-mail at kohl@sunsage.com or call us at (214) 989-7710.