

Pacific Coast Investment Advisors, LLC

Privacy Practices

In accordance with SEC and State of Oregon regulations an Annual Privacy Notice is provided to you. A copy of our Form ADV Part II is available upon request.

PACIFIC COAST INVESTMENT ADVISORS, LLC

PRIVACY PRACTICES

Pacific Coast Investment Advisors, LLC, an investment advisory firm, is committed to safeguarding the confidential information of its clients. We do collect nonpublic personal information in order to open and administer your accounts with us and to provide you with accurate and pertinent advice. We hold all nonpublic personal information you provide to us in the strictest confidence. If we were to change our firm policy, we would be prohibited under the law from doing so without advising you first. Pacific Coast Investment Advisors, LLC claims compliance with ORS 646A.600 "Oregon Consumer Identity Theft Protection Act" [2007 c.759 §1].

Pacific Coast Investment Advisors, LLC collects personal information about you from the following sources:

- Applications or other forms.
- Discussions with unaffiliated third parties.
- Questionnaires.
- Tax Returns.
- Estate Planning Documents.

Pacific Coast Investment Advisors, LLC uses your personal information in the following manner:

- We do not sell your personal information to anyone.
- We limit employee access only to employees and unaffiliated third parties necessary to service client accounts, e.g. custodians, brokers, or as permitted by applicable law.
- We will provide notice of 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 unaffiliated 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 your personally identifiable information to mailing list vendors or solicitors for any purpose.
- 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 will be destroyed.

IDENTITY THEFT PROTECTION POLICY

Pacific Coast Investment Advisors, LLC will make every effort to ensure that client data is protected from identity theft. We take the following steps to protect your data:

- Client information is stored on our secured server, with password protected entry.
- Our central client database is located on our server, and a separate password is required to gain access to client data.
- Electronic access to account information at the custodian is password protected, with a separate password.
- Backup data with client information are stored offsite in a locked safe.
- Documents containing personal client information are shredded prior to disposal.
- Our office building is secured, and is protected by an outside security monitoring system and physical security patrols.
- All prospective employees must agree to a background check prior to their date of hire.

CYBERSECURITY POLICY

Pacific Coast Investment Advisors, LLC maintains a detailed cybersecurity policy (available upon request) implements security in the following area:

- Password policy
- Email and Internet Usage policy
- Anti-virus and Network Security
- Software updates
- Secure Operating Systems
- Removable Media
- Administrative and Privileged Access
- Backups
- Social Media Guidance