

Privacy Policy
January 31, 2023

Third Millennium Advisors, Inc. is an independent registered investment advisor providing financial planning and investment management services to its clients. Third Millennium Advisors, Inc. believes that the information that it holds on its clients must remain private. Third Millennium Advisors, Inc. does not share client information with third parties unless it is required to do so.

Third Millennium Advisors, Inc. may be required to share client information with third parties to help its clients open investment accounts, to request insurance quotes for its clients, or to help its clients to complete insurance applications. In all these cases, Third Millennium Advisors, Inc. will inform the client before client information is shared with third parties. You should carefully review the privacy statements from these third parties because Third Millennium Advisors, Inc. has no direct control over how the third party safeguards its clients' personal information.

Third Millennium Advisors, Inc. may also be required to share client information with state and/or federal regulatory examiners as part of its periodic regulatory examinations. For example, the examiners may want to verify that all assets included in our client performance reports and client invoices can be identified on statements from the account custodians (e.g., Charles Schwab & Co., Inc.).