

Oakmont Capital Management, LLC

Privacy Notice

Oakmont Capital Management, LLC (“OCM”) values your business and your trust. Protecting the privacy of your personally identifiable information is important to us. OCM wants you to understand how we use the personal information we collect and when we disclose it.

OCM does not share personal or private Client information with any third parties except when legally permitted or required. We maintain physical, electronic, and procedural safeguards that comply with federal standards to protect the confidentiality of the information. When your information is shared with third parties, as permitted, the third parties are required to keep the information secure and confidential.

Information OCM Collects:

The following are examples of the type of personal and private information we may collect:

Contact Information:

- Name
- Employment
- Address, telephone number, e-mail

Identification Information:

- Social security number
- Driver’s license number
- Employee identification number

Eligibility Information:

- Assets, liabilities, income
- Net worth
- Investment experience

Third Party Information:

- As required by broker-dealers, custodians, United States Internal Revenue Service and credit reporting agencies.

Information Shared with Third Parties:

Client information may be shared with third parties that perform services on your and our behalf, such as custodial and brokerage services. Generally, we provide third parties with only the information necessary for them to provide their respective service. Your personal information may also be shared, as permitted or required by law, including law enforcement officials and regulators, in response to subpoenas and to prevent fraud.

Confidentiality and Security Procedures:

All personal and private Client information is deemed to be confidential in nature and is of the utmost importance to us. OCM maintains physical, electronic and procedural safeguards, which comply with applicable federal standards for protecting non-public personal information. Our employees may access such information only when there is an appropriate business or investment reason. Employees who violate these standards will be subject to disciplinary measures.

Maintaining Accurate Information:

Keeping your account information accurate and up to date is very important. If your account information is incomplete, inaccurate, or not current, please use the *Contact* option on our website or contact our office at the telephone number or address listed below.

Firm Contact Information:

Oakmont Capital Management, LLC
P.O. Box 52
Oakmont, PA 15139
(412) 828-5550
gkovatch@oakmontcap.com

A copy of this Privacy Notice is also available at www.oakmontcap.com and www.bilkeykatz.com.