



2025 PRIVACY POLICY

The Securities and Exchange Commission (SEC), Regulation S-P, requires all investment advisors registered with the SEC to provide their “consumer customers,” i.e. clients, with written notice of their policies and procedures for disclosure of their clients’ “nonpublic” personal information.

At Verity Investment Partners, we are committed to keeping your information safe. We have the following policies regarding disclosure of clients’ nonpublic personal information:

1. We collect nonpublic personal information about you from the following sources:
 - a. information we receive(d) from you, including on applications and other forms; and
 - b. information about your transactions with us, or with your custodians.
2. We do not disclose any nonpublic information about you or any client, or former client, to anyone, except as absolutely necessary and permitted by law or as requested by you.
3. Only those of our employees who need to know your nonpublic personal information will have access to it. We also share your information with our sub-advisors in servicing your accounts.
4. We maintain physical, electronic, and procedural safeguards that comply with federal standards to protect your nonpublic personal information.
5. We request that you do not share your personal data (social security #'s, birthdates, account numbers etc.) with us or anyone else via email. We offer a secure web-portal for providing such information when requested.

If you have any questions or concerns about our policies, or about our use, maintenance, and disclosure of nonpublic personal information, please call Paula Verity at (843) 379-6661 or by email at paula@verityvip.com.