



## Privacy Policy for SFOs

### 2009 (2<sup>nd</sup> Annual) SFO Study & Forum

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The following is our privacy policy pertaining to all single-family offices, their executives, and the private families they serve:

1. Single-family offices participating in this research are assured of complete anonymity and confidentiality. No list of the single-family offices participating in this research will be published in the written SFO Study report, nor will their names be made available to any outside parties.
2. Only aggregate information or peer group comparisons will be made of firms participating in our Single-Family Office study.
3. A list of attendees of the 2009 SFO Forum will be made available only to our sponsoring partner firms of the 2009 SFO Study. After hearing these firms' white paper presentations and meeting their executives, attendees who do not wish to be contacted should inform an Alliance staff member.
4. On behalf of our sponsoring partners, The Alliance may from time-to-time, conduct a blind mailing or broadcast email to executives of participating and attending SFOs. If, at any time, an executive wishes to opt out of these communications, they can inform The Alliance of their wishes.
5. Certain introductions of a sponsoring partner to an SFO executive may be initiated by The Alliance – via e-mail, phone call or in person - for purposes of doing business together. These one-way introductions will not disclose the identity of the SFO executive to the sponsoring partner – unless authorized otherwise.